ServicePoint™

User's Guide

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ABOUT THIS COURSE

Welcome to Bowman Systems' ***ServicePoint User's Guide.*** This instructor-led training course will provide course participants with the skills necessary to administer and configure ServicePoint components in addition to supporting ServicePoint users.

Students of this course will be introduced to commonly performed tasks related to ServicePoint management and provide practical exercises involved with User account management, security configuration and other duties and responsibilities.

This manual is intended to serve as a source of reference. Due to the accelerated nature of this course, it is highly recommended that you review this manual in its entirety once you return to your place of business and continue to consult this guide throughout the learning process.

THIS GUIDE IS NOT A REPLACEMENT FOR OUR "STEP BY STEP" HELP FILE, BUT RATHER A SUPPLEMENT TO ENHANCE THE TRAINING CURRICULUM.

INTENDED AUDIENCE

This course was developed for individuals designated to be the "System Administrator" of their ServicePoint system. It starts by having participants work at the "Case Manager" level of the system to understand the type of work to be performed by the End Users they will be supporting. Once this foundation is established, the participant is advanced to the "System Administrator" level providing a view and focus on what is required to adequately setup and manage your ServicePoint System. Some chapters (ClientPoint, ShelterPoint, SkanPoint, and Reports) of this manual may be used specifically for End User training.

PREREQUISITES

There are no formal prerequisites such as coursework or a specific knowledge base. It is assumed however that you are comfortable with computers, are familiar with the Microsoft Windows user interface and have used a web-browser to surf the Internet.

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USING THIS MANUAL

Tips and Troubleshooting Notes
This icon will provide tips to usage and techniques that apply to the topic being discussed.

Caution
This icon warns of ramfications of actions taken. You are cautioned to take care in performing certain tasks, particularly those related to system configuration and data entry.

Exercise
Included as part of this course are hands-on exercises to help reinforce introduced topics.

Other reference material relevant to the topics covered in this course can be found in the Appendix at the end of the manual.

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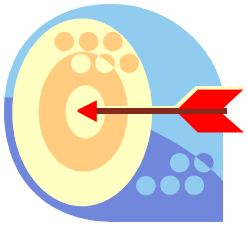
OBJECTIVES OF THIS COURSE

At the end of this course, participants will be able to:



- Navigate ServicePoint's User interface.
- List commonly assigned roles of ServicePoint users.
- Create and configure ServicePoint objects for system usage.
- Choose the appropriate ServicePoint module for assigned tasks.
- Select the appropriate steps to access and perform data entry within ServicePoint's major components.
- Describe the importance of consistency related to data entry tracking and reporting information.
- Describe the importance of workflow development within a ServicePoint environment.
- Create, configure and manage user accounts.
- Plan and create a ServicePoint structure relevant to a given scenario.
- Apply system configuration using ServicePoint's security model.
- Create Client ID cards.
- Describe the how to manage ServicePoint licenses.

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CHAPTER 1: THE SERVICEPOINT COMMUNITY

CHAPTER OBJECTIVES:

- Provide overview of ServicePoint features and functions.
- Familiarize participants to considerations related to real-time environment.
- Introduce terminology specific to ServicePoint.
- Describe the role and responsibilities associated with a ServicePoint System Administrator.
- Discuss importance of workflow planning and documentation.
- List the hardware and software requirements of a User of ServicePoint.

WHAT IS SERVICEPOINT?

ServicePoint is a web-based application that permits organizations to manage Client and resource data within a real-time environment. Your Client management information system is designed to address specific Needs of the organization including:

- Centralized Client intake and detailed assessments
- Record of Services provided
- Case Management
- Area Agency and Program Designations
- Shelter/Bed Management
- Custom Reporting Capabilities
- Flexible Security and Data Sharing Options
- HIPAA Compliance

Those who use ServicePoint have the ability to record Client demographics, assessment, referrals, historical information, and outcome measurements in addition to generating reports like the HUD APR, the PATH Report, and others.

Organizations using ServicePoint have the advantage of being able to:

- Quickly help those in need and those seeking Services.
- Provide detailed and summarized data to meet funding reporting requirements.
- Make the task of tracking Client activities, Needs and provided Services easier.
- Confidently share data with others within your ServicePoint community.
- Provide selective data security for each Provider and Client (complete access, partial access, no access).
- Control user accessibility to your ServicePoint system using role assignments.
- Generate standard and customized reports.

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SERVICEPOINT PROVIDERS

System Administrators are responsible for establishing and maintaining the ServicePoint environment. Their decisions directly impact the organization of, and the ability to share, Client information. ServicePoint information is organized using objects known as ***Providers***. A ServicePoint Provider can represent a community, a continuum of care, an agency, a program/project or a site. The ServicePoint "environment" is simply the hierarchical structure of each Provider's relationship to one another. This Provider hierarchy starts with Level 1 Providers and can work its way infinitely downward. However, we recommend keeping the Provider structure to an easily managed number of levels whenever possible.

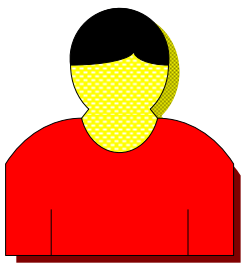
Sharing information is one of the key elements of a community. ServicePoint permits the sharing of information through the management of several levels of security. Each Provider can determine not only who can see their clients' information, but also which aspects of their clients' information can be seen. This allows users of ServicePoint to have confidence that their Client data is secured to meet legislative and organization requirements.

SYSTEM ADMINISTRATOR ROLE AND RESPONSIBILITIES

System Administrators are assigned the responsibility of overall management of the ServicePoint system and its users.

This includes:

- Designing the ServicePoint structure to reflect your organization's operational environment and data entry Needs
- Identifying your community's agencies and related Services and Needs
- Working with others within your organization to identify and document workflow related to ServicePoint User roles and data entry processes and procedures
- Creating and configuring the ServicePoint structure in accordance with each agency's Needs



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- Securing Client and agency data from possible unauthorized access
- Educating Users of the proper use of your ServicePoint system
- Serving as a point of contact to ServicePoint Users
- Ensuring workstation minimum requirements are met
- Educating users of the proper use of Windows-based interface and related components

USERS AND USER ROLES

Each User within ServicePoint is identified as belonging to a particular Provider called their *Default Provider*. Once created, Users cannot be moved from one Provider to another. If a User Needs to enter data for more than one Provider, then that User must be given a separate User Logon ID and Passcode for each Provider. However, if the User Needs to enter data for more than one Provider within its own agency or hierarchical Provider structure, his/her User ID can be given explicit permission to enter data for those Providers. This does not require multiple Logon IDs and Passcodes.

ServicePoint users are assigned specific roles based on their designated duties. Security-sensitive components of a Client's record are either displayed or hidden within ServicePoint based on the role assigned. Although there are a variety of roles that can be assigned, this course will concentrate on three of the most commonly assigned roles:

System Administrator II – individuals assigned to provide system-wide management and support of a ServicePoint environment.

Agency Administrator – individuals assigned to perform management and support at an agency level within a ServicePoint community.

Case Manager II – individuals assigned to maintain Client records and perform the majority of data entry related to Client activities and the Services provided.

A detailed breakdown of user roles is listed in Appendix A. A chart of role capabilities is shown in Appendix B.

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DEVELOPING A SERVICEPOINT SYSTEM USAGE FLOW

ServicePoint is a highly flexible system that can be configured to reveal information needed for Client assistance and Service tracking purposes. The development of procedures to reflect how work is done within your organization is an important element in the management and usage of ServicePoint. Published processes and procedures that Users can follow in order to achieve tasks will greatly assist in the successful transition to a ServicePoint community.

Workflow development is a joint effort. Administrators serve as facilitators in helping others to understand what is needed and what must be collected in order to reflect their particular organizational Needs within ServicePoint.

During this course, we will follow a sample workflow. As you are working through the course, we ask that you think about day-to-day activities and how data is collected within your organization and community. Workflows introduced in this course are intended for training purposes only and do not represent all ways of doing business or all possible system setups/configurations. Your specific setup will depend on your own community's needs and the daily activities of each organization using ServicePoint.

SERVICEPOINT HARDWARE AND SOFTWARE

As shown below, the Internet is a means to transport data between ServicePoint Users and the Data Center (no information is stored within the Internet). Using one server to house the ServicePoint application and another server to store Client and Provider data, your web-based ServicePoint system is accessible via a network connection or through a dial-up modem.

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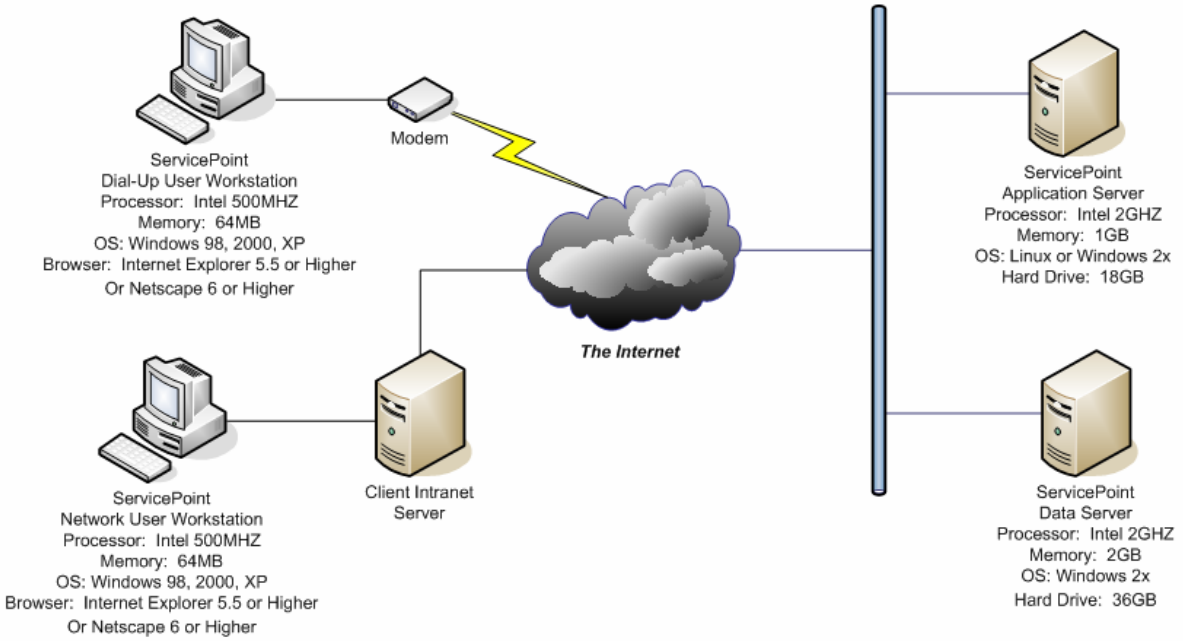

Figure 1: ServicePoint Connectivity Methods

Take note of the workstation system requirements for ServicePoint access and operation. It is the System Administrator's responsibility to ensure that each User's computer meets these requirements.

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IN SUMMARY…

- ServicePoint is a web-based Client management system and includes numerous features to help public Service organizations manage their Client base.
- ServicePoint is HIPAA compliant.
- The main "objects" within ServicePoint are called Providers.
- Provider structures are presented in a hierarchical manner.
- Providers can be CoC, agency, program /project or site.
- A community is a grouping of Providers who share common interests in serving those in need.
- Sharing information is an important element of a ServicePoint community.
- The role of the Administrator is to provide system usage support and training, in addition to performing day-to-day system maintenance.
- Several security-sensitive roles can be assigned to a User depending on the User's responsibilities within their ServicePoint system.
- Understanding how the system will be used to support daily activities of your organization and with the community is an important component in the smooth transition to a ServicePoint environment.

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CHAPTER 2: GETTING STARTED

CHAPTER OBJECTIVES:

- List the main modules within ServicePoint.
- Describe the functionality of each ServicePoint module.
- Discuss data security considerations related to User usage.
- List information needed to access and connect to a ServicePoint system.
- Navigate ServicePoint using Navigation Tabs and the Navigation Box.
- Explain when to use and when not to use the web browser Back Button.

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ACCESSING THE SERVICEPOINT SYSTEM

Each User of ServicePoint must be verified as an authorized User by means of an assigned logon name and password. Based on what has been assigned by the Administrator, the verification process permits ServicePoint to identify the User and to grant or restrict access (called permissions) to the various ServicePoint areas. *Tasks related to how permissions are assigned are provided in the Administration section of this course.*

DATA SECURITY CONSIDERATION

The security and confidentiality of Client data is very important and taken very seriously within the ServicePoint application. Bowman Systems has taken extraordinary steps in the design of ServicePoint to give each Provider complete control over who can access its Client data and what Client data can be access.

It is important that all users follow the security and data sharing procedures set forth by the Administrator. Failure to protect confidential data could result in employment termination, as well as legal action against the User.

Habits can be instilled to keep the level of security integrity high. Recommendations are as follows:

Users should guard their IDs and passwords.

Users should not share or write down passwords.

Users should not store Client names and social security numbers on their computer system.

Users should avoid creating screen prints. If done, documents should be protected from unauthorized viewing and disposed of properly as soon as possible.

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WEB BROWSERS

To display the ServicePoint Logon Screen, users will need access to:

- a web browser and,
- the Internet, either through the agency's network or by dial-up.

The two most common web browsers are Internet Explorer (IE) or Netscape. Though ServicePoint is compatible with many other commonly used web browser applications, ServicePoint is best experienced with Internet Explorer.

DATA ENCRYPTION AND SITE ADDRESSING

Encryption is the method of converting data into a mass of meaningless and random information in order to protect the data as it travels "over-the-wire" from one location to another. ServicePoint uses Verisign's Secure Socket Layer (SSL) 128-bit encryption protocol (the most secure encryption method) to secure communication from the database server to the User's computer. Internet Explorer 5.0+ and Netscape 6.0+ both have 128-bit encryption capability for sending information from the User's computer to the database server. We recommend using a current version of either of these browsers to complete this "security loop."

Web browsers use an addressing method called URL (Uniform Resource Locator) to find websites on the Internet. Users will need to know the address to their ServicePoint site in order to gain access. Web browsers look for key words at the beginning of the address to indicate which technology to use when connecting to a web site.

- The use of **http://** tells the browser to use a standard (unsecured) Internet connection.
- Using **https://** tells the browser to connect using a secure (protected) connection.

All ServicePoint Live Sites have this added level of security, so all ServicePoint Live Site URLs begin with "https". However, ServicePoint Training Sites are not equipped with this extra layer of security, so their URL's begin with "http". The latest versions of web browsers will automatically detect which protocol to use. Therefore, access to ServicePoint can be gained simply by typing "www3.servicept.com/_____."

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For this training session, your Instructor will provide you with an address that will be used for the remainder of the course. Please enter the address in the space provided below. Use the second line to record your Live Site's URL:

http://_____

https://_____

USER NAME AND PASSWORD

In addition to having an address to a ServicePoint site, a User name and password are also needed. ServicePoint requires User passwords are between 8 and 16 characters in length **AND** contain at least 2 numbers. Both System and Agency Administrators can enter new Users into the system, and when they do so, a Password is automatically generated by ServicePoint. After the new User logs into the system the first time, they will then be required to change the initial password to one of their choice (Figures 2 & 3 below). However, the password must conform to the password requirements mentioned above. For security reasons, passwords expire after 45 days. When this happens, the User is required to select another password before entry into the system is allowed.

You should never share or write your password in a place where it can be easily seen or retrieved by others. One way to keep track of your password is to keep it in your name and address book under a code name.

SERVICEPOINT LOGON SCREEN

When a User enters their Logon and password, ServicePoint validates entry before access is given. If the wrong Logon or password is typed, ServicePoint will re-display the logon screen. If a User enters an incorrect Logon or password four times consecutively, ServicePoint will label the account as "inactive." This requires the Administrator to generate a new password. ServicePoint does not indicate whether it is the Logon or the password that has been entered incorrectly.

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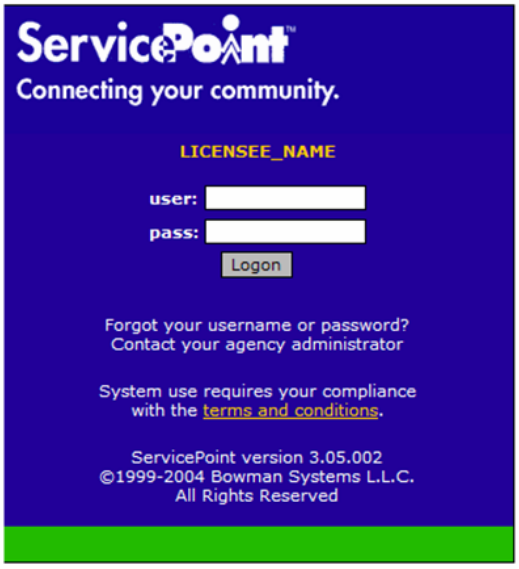

Figure 2: ServicePoint Logon Page

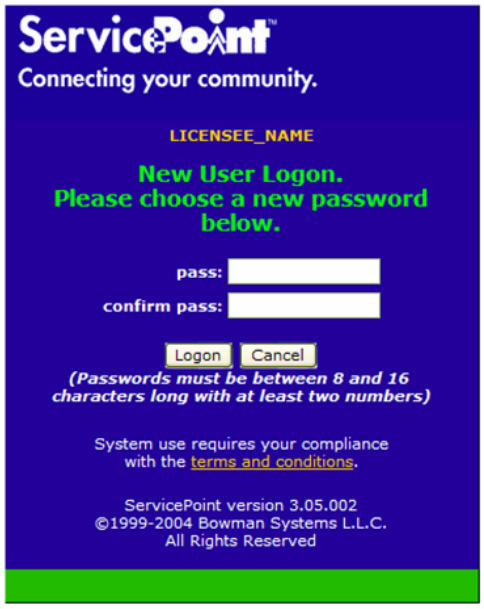

Figure 3: New User Password Logon

All new users are prompted to accept or not accept terms and conditions related to their ServicePoint license agreement and system usage. Once accepted, ServicePoint will grant access and display its Home Page. (Figure 4)

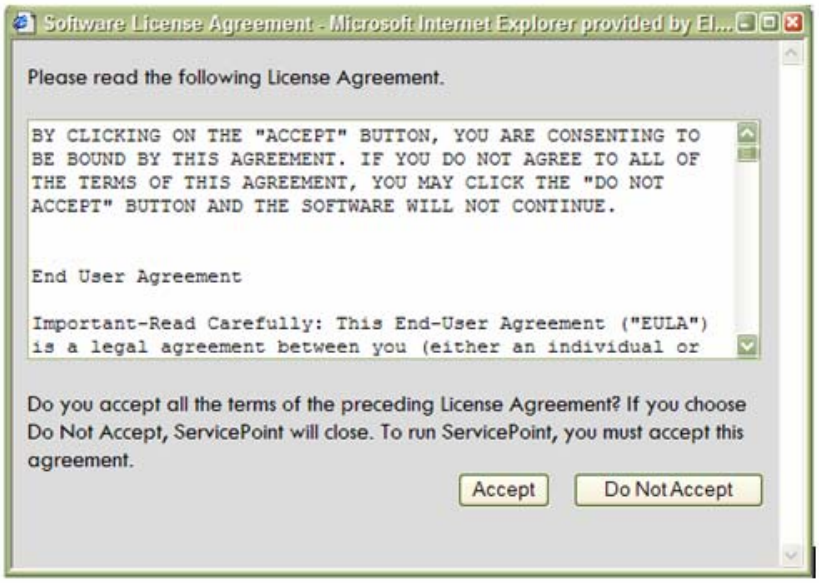

Figure 4:Terms and Conditions Popup Window

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SERVICEPOINT MODULES

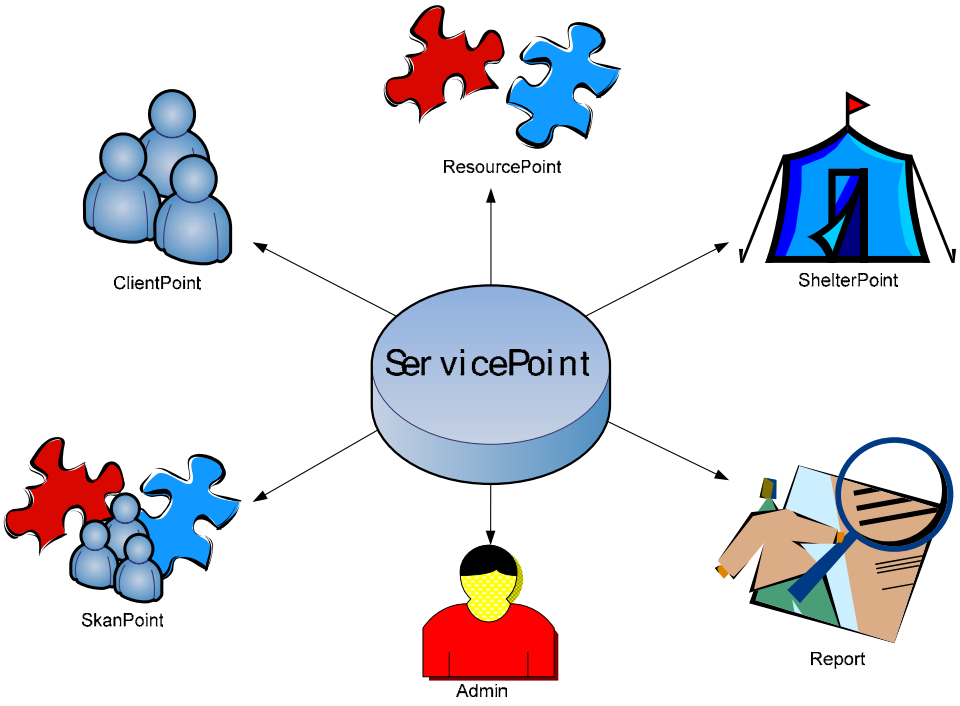

Figure 5: ServicePoint Major Modules

ServicePoint is divided into six modules: ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Administration, and Help. Below is a list of the modules and their related functionality. Access to each of these modules is determined by the User's Access Level (i.e. Volunteer, Case Manager, Agency Administrator, etc) and the special permissions assigned to each User.

MODULE NAME	DESCRIPTION
ClientPoint	Client recording and tracking module used to record and maintain Client demographics, assessments, case plans and Service transactions.
ResourcePoint	Utility used to locate Providers of particular Services within the ServicePoint community.
ShelterPoint	This module is used to perform Client check in/out of shelter beds and can now mark beds as "on hold" for securing reservations and/or for securing all beds in an apartment-style shelter.

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MODULE NAME	DESCRIPTION
SkanPoint	Utility that eases the burden of Service entry for high volume Providers by quickly recording one Service for multiple Clients at one time. It also allows Providers to assign ID cards that can be scanned to quickly access a Client's record. *This module is only visible if turned on by the Administrator at both the System and User levels.*
Reports	This module generates standard and custom reports of Client and Service activities.
Admin	Utility used by Users associated with an administrative type role to configure the ServicePoint system including adding and configuring Providers, creating and configuring users, and customizing operational tasks.
Help	Online Help utility with descriptions of system capabilities and instructions for performing commonly used tasks.

Table 1

HOMEPAGE

HOMEPAGE COMPONENTS

The HomePage is the first stop for all Users after a successful logon (Figure 6). It is divided into several areas for informational or access purposes related to Client information management.

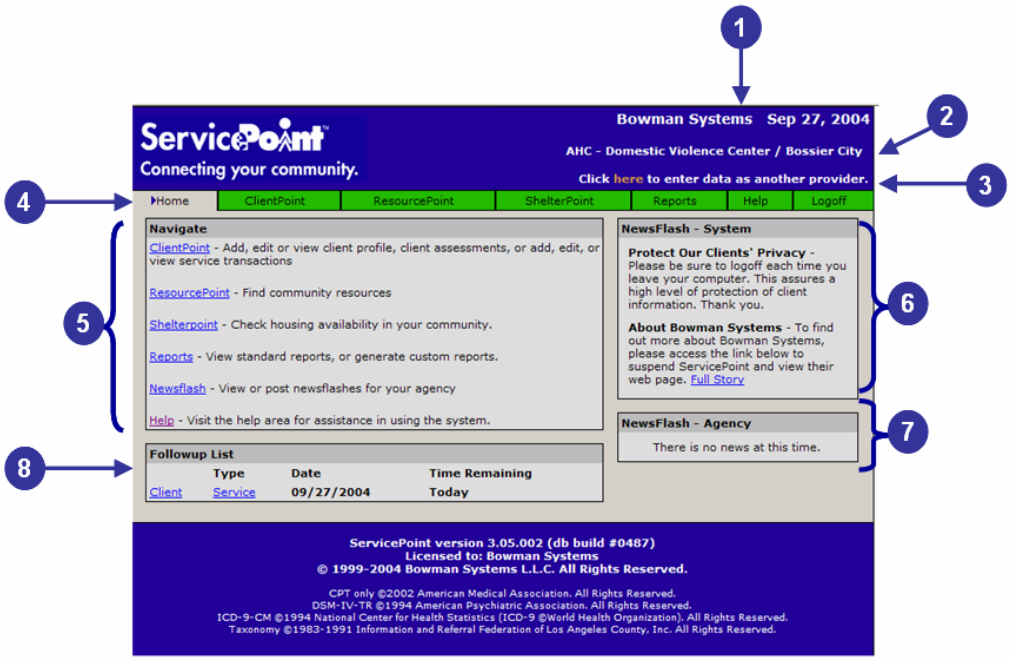

Figure 6: ServicePoint HomePage

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Header: The Header is the blue portion of the screen located at the top of each ServicePoint page. It contains the following information (Figure 6 above):

- the name of the ServicePoint community ❶ and the current system date;
- the User's default Provider ❷, as assigned by the Administrator;
- a link for allowing the User to enter data for a Provider other than his/her Default Provider ❸.

Navigation Bar❹: The green Navigation Bar is comprised of seven (7) tabs, each one dedicated to a ServicePoint module. Movement between the modules is easily accomplished by simply clicking on the desired tab. As the User transitions through the system, the tabs will change from green to grey indicating which module the User is currently using.

Logoff returns the User to ServicePoint's initial Logon screen. If a User closes his/her browser while in the system, he/she will be logged out of ServicePoint.

"Navigate" Box ❺: This area provides the User with a brief description of each module. It also offers another method for entering into the desired module by means of a web-based element called a **hyperlink.**

NewsFlash: This section is an excellent way to keep users informed of relevant issues within the ServicePoint community. It is divided into two sections:

- **NewsFlash – System** ❻**:** Created and updated by the System Administrator, this area displays information on a system-wide basis. It is useful for announcing information that all Users in your ServicePoint installation need to know, e.g. scheduled maintenance, new legislation that affects your community, upcoming meetings, etc.

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- **NewsFlash – Agency ❼:** Information displayed in the section is specific and applicable to the agency to which the User belongs. It can be managed by the Agency Administrator, Executive Director or System Administrator.

"Followup List"❽: When using ServicePoint's case management section of ClientPoint (Case Plans), Users can set personal reminders to followup on a Client's Goals, Action Steps, or Services. Since "followups" are created by and for a specific User, User's can only see his or her own reminders in this section of the Home Page.

The creation and updating of "follow-ups" are covered later in this course.

Footer: This informational area displays ServicePoint's version number, the licensed organization, and copyright information for ServicePoint and the code sets used by permission in ServicePoint.

ServicePoint utilizes Pop-up Windows as part of the system usage and operation. Therefore, if you use a Pop-Up Blocker application, consider disabling it when using ServicePoint.

WORKING WITH MULTIPLE PROVIDERS

If a User has been configured to enter Assessment data for more than one Provider, he/she can move from one Provider to another using the same account by clicking the **Click here to enter data as another Provider** located at the top right-hand corner of the screen (Figure 7 below).

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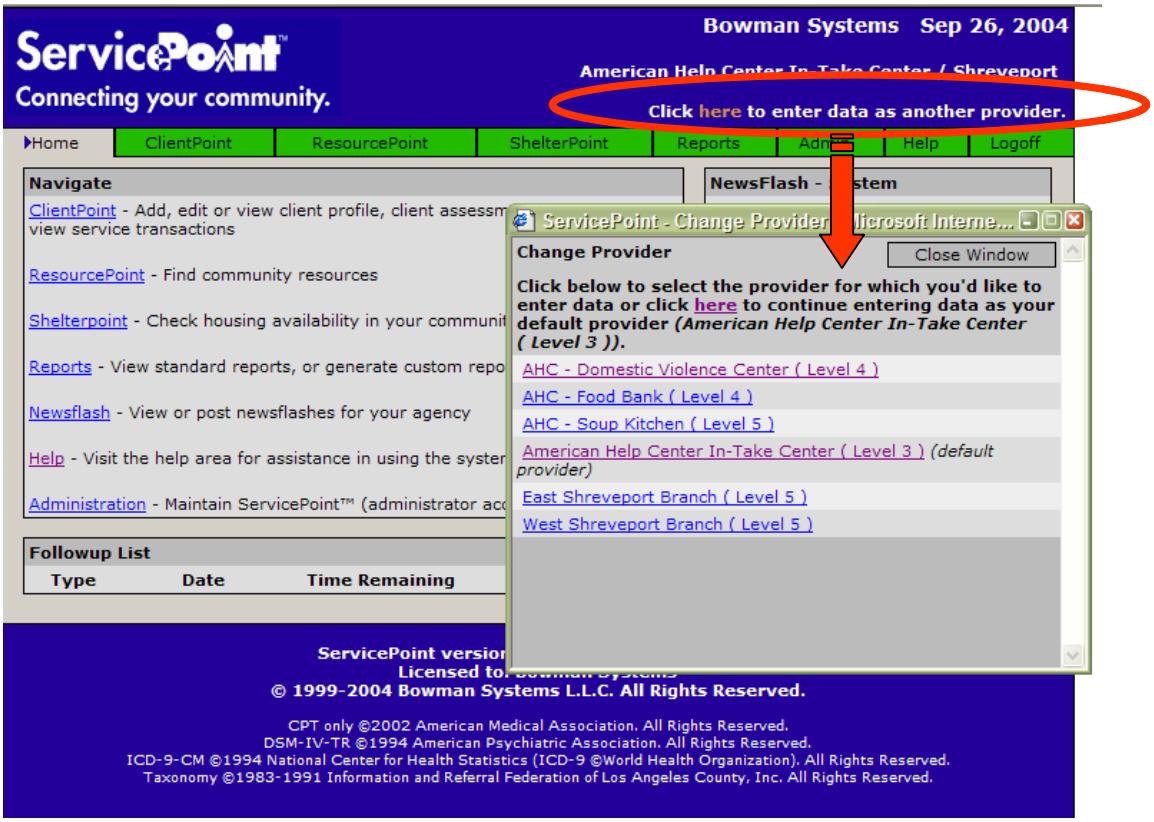

Figure 7: Change Provider Popup Window

A popup window opens to display all the other Providers for which the User has permission to enter data, including the User's default Provider. It may be helpful to think of each Provider as a separate place, or bucket, within the database where data is collected and stored. Client data security is applied at the Provider level, therefore it is very important to be sure the User knows for which Provider he/she is entering data. If the User enters data for the wrong Provider (or the wrong "bucket") there could be a breach of confidentiality.

Movement to another Provider will close all existing records and display the HomePage. Data may be lost if not saved prior to selecting another Provider.

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CONSIDERATIONS WHEN USING A BROWSER

Knowing whether to use the web browser's navigation bar or ServicePoint's navigation bar is a matter of whether the User is working within or outside of ServicePoint. A consideration to remember when working within ServicePoint … the User is working in a real-time environment. When using a web browser, the **Back Button** takes the User to the last page viewed without refreshing information displayed on that page. Using ServicePoint's **Navigation Bar** (Tabs) or **Box** prompts ServicePoint to automatically refresh data in the screen selected and display the most current information. It is therefore recommended to:

- Use the Navigation Tabs when moving within the ServicePoint system.
- Use the Back Button when moving around outside ServicePoint such as when surfing the Internet.

USER ACCOUNT INACTIVITY

If a User's account is inactive for more than 30 minutes, ServicePoint will automatically log the User out of the system. However, it is important to note that the last accessed page will remain visible on the User's computer screen. Users should always log out of the system prior to leaving their computer unattended for any amount of time. If the screen is left open to a Client record, there is a potential for a breach in Client confidentiality.

After a User is automatically logged off, and he/she tries to access another ServicePoint page, ServicePoint will display the following message, prompting the User to log back into the system:

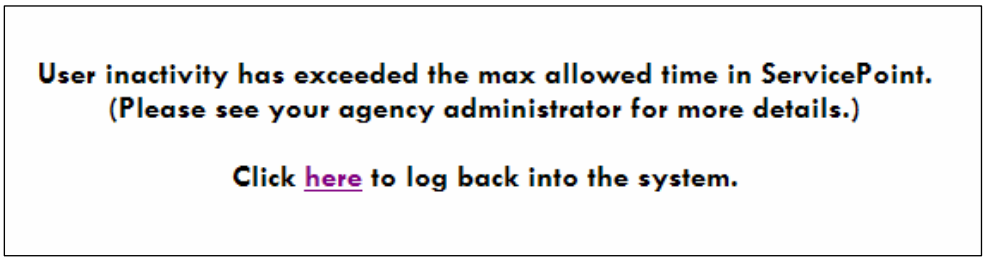

Figure 8: Inactivity Page

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IN SUMMARY …

- Access to web-browser software and the Internet is needed to access ServicePoint.
- User identification is verified before access to ServicePoint is granted.
- ServicePoint uses 128-bit encryption to transmit data to and from users.
- ServicePoint's "Live Sites" are accessed via a secured (https) connection, an extra layer of security.
- User passwords must be between 8 and 16 characters and contain at least 2 numbers.
- Passwords must be renewed every 45 days.
- ServicePoint consists of 7 major modules: ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Admin, and Help.
- SkanPoint is optional. If not turned on at a system-wide and user level, SkanPoint will not appear.
- The Home Page has a header area that displays the name of the ServicePoint community, the current system date and time, the User's default Provider and a link to change Provider if the User has the permission to do so.
- Access to ServicePoint modules can be performed using the Navigation Bar or the "Navigate" Box.
- Users are informed of system-wide information, events, and activities through the News Flash – System box. Provider-specific information is relayed using the News Flash – Agency box.
- Use the Navigation Bar and other hyperlinks to move within ServicePoint. Use the browser's Back and Forward buttons when browsing outside ServicePoint.

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CHALLENGE STEP …

1) Access your community's ServicePoint Training Site.
2) Logon to the Site.
   a) Change your temporary password to a new password.
3) Use either the Navigation Bar or the Hyperlinks in the Navigation Box to access the seven modules of ServicePoint.
4) Access the Help File.

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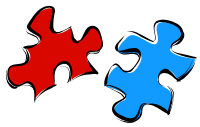
CHAPTER 3: USING RESOURCEPOINT



CHAPTER OBJECTIVES:

- Describe the functionality of ResourcePoint.
- Discuss Provider linkage using parent-child relationships.
- Define taxonomy terms and how they are used in ResourcePoint.
- Describe how to search a ServicePoint community for Providers of advertised Services.
- Describe how the Lookup PopUp window is used to select Service codes.
- Describe how to navigate within the Provider Profile page of ResourcePoint.

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INTRODUCTION

Before we can properly serve our Clients, we must understand and quickly identify the Services offered within our ServicePoint community. There is a national effort currently underway to provide a service, similar to 911 Emergency Services, that will provide information and referral services to individuals and families in times of crisis.

ResourcePoint is an easy-to-use Information and Referral (I&R) tool that allows Users to view Providers within the ServicePoint community. Users can quickly search their community using a variety of criteria including name, location, or type of Service offered by a Provider.

PROVIDER PARENT AND CHILD RELATIONSHIPS

The linkage between Providers within ServicePoint is described in terms of parent-child relationships. A simple example of this is an agency that has several programs. The agency is the "parent" of the programs, the "child Providers." The term "Child Provider" does not refer to an agency or program that provides child Services.

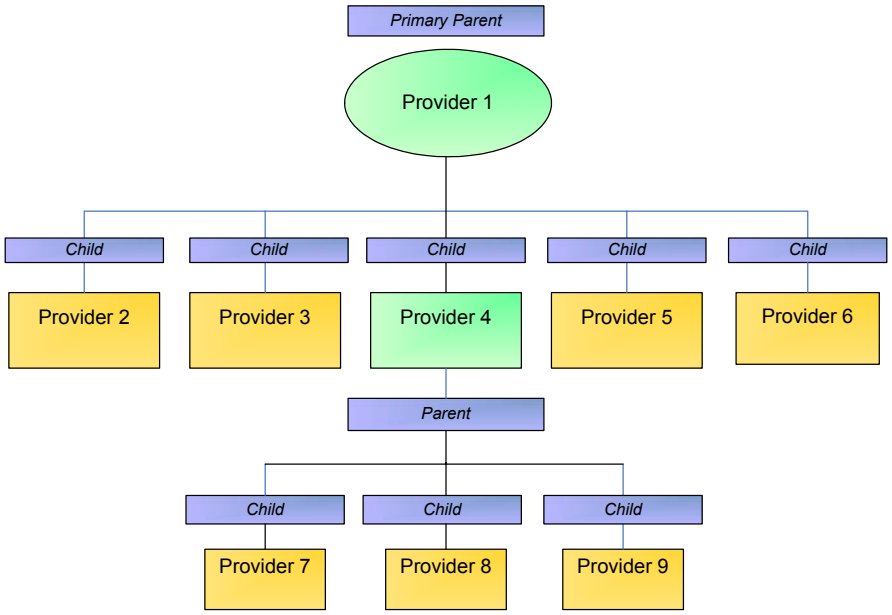

Figure 9: Parent/Child Relationship

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In Figure 9 above, Providers 2 through 6 are Child Providers of Provider 1 (the "parent"). Provider 4 is the "parent" to three Child Providers (Provider 7, Provider 8 and Provider 9).

WHAT ARE TAXONOMY TERMS AND WHY ARE THEY USED?

ServicePoint allows Users to access several standard code sets for recording Client Needs and Services. Providers are also able to define the Needs and Services they provide using these code set terms. Each of the code sets is used by different social service groups, however, the AIRS taxonomy is the one most commonly used. Access to these code sets is determined at the User level.

The code sets supported by ServicePoint are:

1.	AIRS Taxonomy (Human Services)	2.	CPT: Medical Treatment Codes
3.	ICD-9: Medical Diagnostic Codes*	4.	DSM-4: Mental Health Diagnostic Codes *

*Additional charges apply

The Alliance of Information and Referral Services (AIRS) has created a system to standardize terminology and definitions used by Human Service organizations known as the AIRS Taxonomy. This code set enables Providers to:

- Define Services, using a standard language of common terms and definitions, for identifying Client Needs.
- Use an easy and reliable means of locating community services using keyword searches.
- Take advantage of collaboration opportunities by providing a common language for use between different disciplines.
- Use a common point of information sharing between information systems and Provider databases.

A code set must be selected for each User in order to have transaction tracking capabilities. ServicePoint uses these code sets for all Service Transactions. Since the AIRS Taxonomy is the most commonly used code set, all Users are given access to it by default.

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SEARCHING FOR PROVIDER SERVICES

Selecting the ResourcePoint tab will display the Enter Search Criteria screen (Figure 10). There are several ways to locate a community resource from this screen:

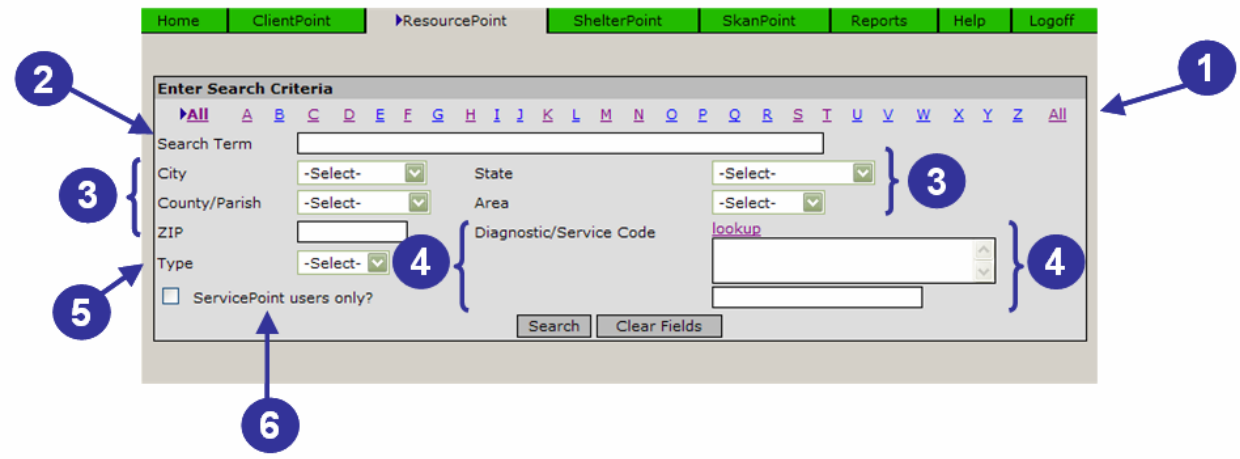

Figure 10: ResourcePoint Search Page

❶ **Alphabetic**: This will list Providers that offer Services by the first letter of the Provider name. Users can also list all Providers within the community.

❷ **Using Keyword/Search Terms**: This option permits a more specific means of locating Providers, searching any words found in the name and the Description of all Providers in your ServicePoint community. Searching by a part of a name or even a part of a word will also yield search results. For example, if the user is seeking the 'Domestic Violence Center', entering "Domestic", "Dom", or "Violence" would display any known Provider whose name matches the search criteria entered.

❸ **Location:** Users can use this option to search for a Provider based on city, state, county, region, or zip code. If defined, a User can even search based on the areas served, (i.e. by certain regions of a county or city).

❹ **Diagnostic/Service Code:** System and Agency Administrators can designate the Services each Provider provides using any of the available taxonomies. This allows Users to search for agencies based on the specific Services they provide.

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❺ **Type:** This option allows the User to search for all Providers who are at a specific level within the ServicePoint environment or Provider structure.

❻ **ServicePoint Users:** When this option is checked, it will display only those Providers who use ServicePoint.

LOOKUP POPUP WINDOW

When selected, the **lookup** hyperlink displays a popup window that allows Users to search for Providers that have been identified as providing specific Service codes (Figure 11).

Figure 11: Service Code Search Popup Window

If the User has permission to use more than one code set, he/she will need to choose which code set to access. This is done by choosing the desired code set from the dropdown menu located in the top left hand corner of the screen.

Finding the desired code can be accomplished one of two ways. Users can either enter search criteria in the search field ❼, or they can "drill down" the hierarchical module by clicking on the black arrow next to the desired code ❽. Enter service terms, or words that describe services, and then click the **Search** button for the easiest and quickest way to locate a particular code.

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Users must be configured with permission to use various Code Sets. Granting Users this capability is described in the Administration section of this course under User Configuration.

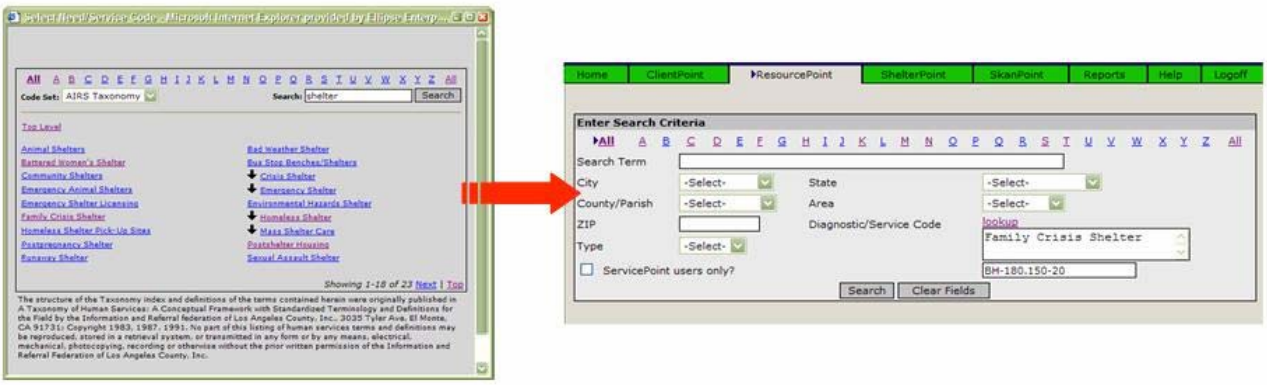

Figure 12: Service Code Search

Some of the listed terms have a ⬇ icon located to the left of the term. This arrow indicates that there are subcategories associated with that term that more specifically define the Service desired. Clicking on the term will add that term, along with its associated code, to the Diagnosis/Service Code section. Selecting the ⬇ icon will move the User to the subcategories for further selection. (Figure 12)

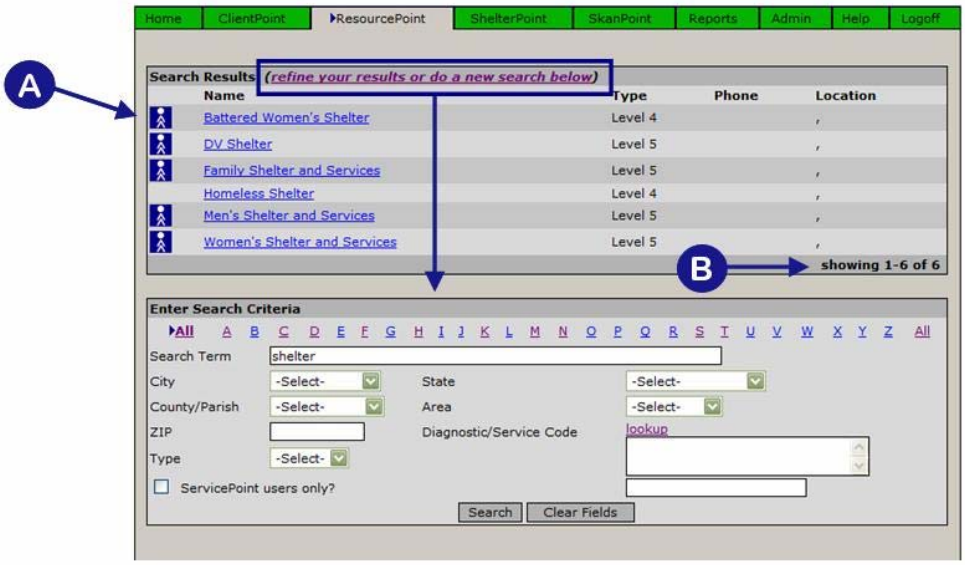

Figure 13: ResourcePoint Search Results Page

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Results of a resource search are shown in the newly displayed screen (Figure 13 above). The icon (**A**) indicates that the Provider is a ServicePoint user.

The total number of Providers is displayed on the right-hand portion of the screen (**B**) This screen will display 30 Providers at a time. If more than 30 Providers match your search, click on the (**Next**) hyperlink to access additional Providers or the (**Prev**) hyperlink to access the previous search results.

Navigating the Provider Profile Page

Once a User selects a Provider, the Provider Profile page is displayed (Figure 14). This page offers a variety of information that has been configured by the Administrator. In addition to displaying the name of the Provider ❶, and whether the Provider is a ServicePoint user ❷, there are several hyperlinks: one that can be used to view the "parent" of the Provider ❸, one that allows the User to e-mail the Provider contact, and one that displays the Provider's website ❹, and one that allows the user to display and link to the Provider Profile page of any "child" Providers of the selected Provider ❺.

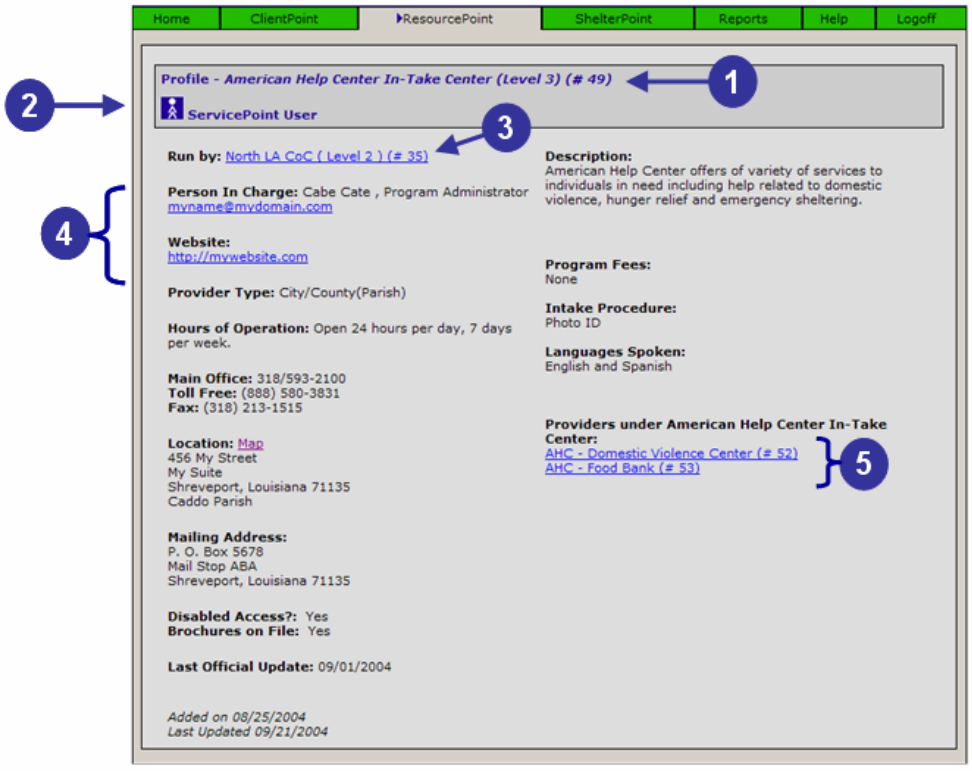

Figure 14: ResourcePoint Provider Information Page

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IN SUMMARY …

- ResourcePoint is an I&R tool used to view Providers within the ServicePoint community.
- Links between Providers are described by using parent-child relationships.
- Code Sets such as the AIRS Taxonomy are used within ServicePoint to provide a standardized language for recording Client Needs and provided Services.
- ResourcePoint offers several ways to search a community to locate Providers: by Provider name, keyword, location, Service code, Provider type (level), and those Providers who are ServicePoint Users.
- The **Lookup** popup window is used to locate and select Service codes being sought.
- The *Provider Profile* screen displays information configured by the Administrator about the Provider selected.
- Several active hyperlinks within the *Provider Profile* screen permit the User to move to the Provider parent or child and/or access a Provider contact or website information.

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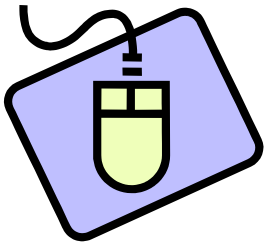
CHALLENGE STEP …



1. Access ResourcePoint.
2. View all Providers in your ServicePoint database.
3. Search for a specific Provider using one or more of the search capabilities.
4. Access a Provider's Profile Page.

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CHAPTER 4: CLIENTPOINT

CHAPTER OBJECTIVES

- Describe the components of ClientPoint.
- Apply a sample workflow for ClientPoint usage.
- Recognize information tied to HUD reporting.
- Describe steps necessary to retrieve and add Client records.
- Apply Client-based security to Client records and areas within a Client record.

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CLIENTPOINT COMPONENTS

ClientPoint is made up of four pages, each with its own tab. Like the Main Screen, this provides easy navigation from one "sub-module" to another.

The functionality of each "sub-module" is as follows:

PAGE NAME	DESCRIPTION
Profile	Typically collects preliminary and static information about a Client. Each Provider has control over which Assessment is displayed on this page.
Assessment	Used for easy tracking of demographic and statistical information about a Client.
Case Plans	Facilitates the development of measurable Goals and objectives. Client activities related to Goals are captured for reporting purposes.
Service Transaction	Used for enter Client Needs, make Referrals to agencies for assistance, and log Services provided.

Table 2

The majority of work performed by a Case Manager is performed using the ClientPoint module. Users can create new Client records, retrieve and update existing Client records, capture assessment information, document case plans, record details related to Services provided.

The following is an example of a common workflow using ServicePoint. This is a highly generalized workflow that is intended to illustrate several of ServicePoint's designed workflow features.

1. Search the system to determine whether the Client already has a ServicePoint record created by another Provider within your ServicePoint community.
2. If the Client record exists and is open for viewing, retrieve the record by clicking on the appropriate Client name (this is a **hyperlink**).
3. If the Client does not exist, create a new Client record.
4. Record the Client's decision to allow your Provider to share his/her information (Release of Information).
5. Input static information and "enter" the Client into your organization's program (Entry/Exit).

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6. Assign a caseworker and, if required by established procedures, secure the Client record from viewing by other Providers.
7. Perform and record an evaluation (or an "Assessment") of the Client.
8. Develop a strategy that outlines Goals to assist the Client, Client-specific steps to achieving Goals, and User-specific follow-up items.
9. Identify the Service or Referral needed to complete the task.

In your actual work environment, your workflow may be different. You may have fewer or a greater number of steps in performing a particular task. For example, a Food Bank may wish to record only basic Client information and the Service provided. In contrast, a Substance Abuse Center may require a more comprehensive medical history. In addition, there could be different people performing each particular task. One person could obtain general information; another handle the case plans and the recording of Services provided to meet the Client's need.

HUD EXPECTATIONS

Understanding how Services are being used based on specified criteria allows an organization to make better decisions as to how to improve the delivery of Services. In addition, the accumulation and management of statistics related to SERVICES a Provider supplies is necessary for Federal reporting and funding requirements.

Some areas within ServicePoint require proper entry and setup in order to produce unduplicated counts when producing reports. As we progress through this course, these areas will be covered, but it is vital that data entry is performed correctly in order to accurately track and report Services provided. (For more details, see the HUD Tech Note located on the Self-Service Portal)

SEARCHING CLIENT RECORDS

The first step toward accurate reporting is the prevention of creating duplicate Client records or files. ServicePoint's **Client Search** screen prompts Users to search through possible Client matches before adding a new Client record. (Figure 15 below)

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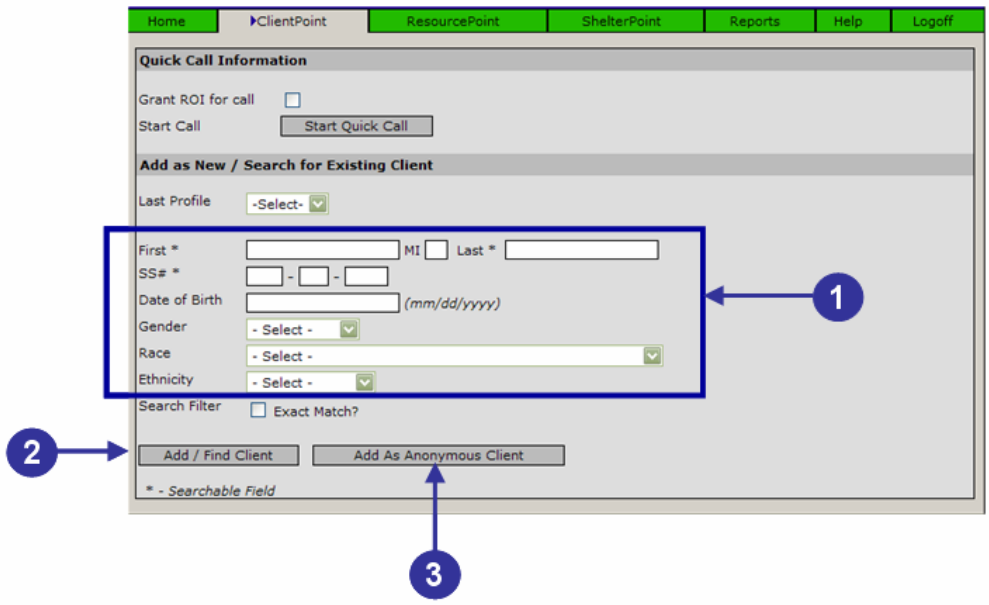

Figure 15: ClientPoint Search Page

The **Add as New/Search For Existing Client** section ❶ of this screen, allows Users to either add a new Client record or search for an existing Client record. Once the User enters the Client's demographic information, clicking on the **Add/Find Client** button ❷ prompts ServicePoint to perform an initial search for Client records with matching criteria. Clicking on the **Add As Anonymous Client** button ❸ will add the client to the system but without a name (see the following *Creating Anonymous Client Records* section).

ServicePoint only searches the First Name, Last Name, and Social Security Number fields for "possible matches" when searching for an existing Client record.

CLIENT IDENTIFICATION

ServicePoint identifies each Client in two ways:

Client ID:
Every Client record that is created is given a Client ID, sometimes called the "*Static ID*." This number is generated by ServicePoint sequentially. Therefore, the 123rd Client Record created in

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an installation of ServicePoint will have the Static ID "123" associated with it. This number will never change.

Unique Identifier:

The other way in which ServicePoint identifies each Client is the Unique Identifier.

Several fields are used by ServicePoint to generate a Unique Identifier for a Client. These fields are critical for creating a unique Client record:

- First Name
- Last Name
- Date of Birth
- Gender

It is possible to alter the Client's name after the creation of his/her record. The Unique ID is therefore sometimes referred to as the *Dynamic ID*. When compared with the Static ID, the Dynamic ID helps provide unduplicated counts for accurate reports of Client data. The Unique ID is derived from:

1. the first character of the first name,
2. the first and third characters from the last name,
3. a gender representation (m = male, f = female, t = transgender, _= null),
4. all eight characters of the date of birth, and
5. a string of alpha-numeric characters based on the way the Client's name sounds (the "soundex").

For example if the following information is entered, the Unique ID for each of the Clients below would be as follows:

Name	Date of Birth	Sex	Unique ID
Joshua Jones	10/11/1960	Male	jjn1011960j200j520
Jane Jones	Blank	Female	jjnf00000000j500j520
Jeremy Jones	Blank	Blank	jjn_0000000j650j520

Table 3

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Since the First Name and Last Name are used to produce the Unique ID, it is recommended that Users always enter the Client's full given name. For example, "Robert Johnson" is more accurate than "Bob Johnson."

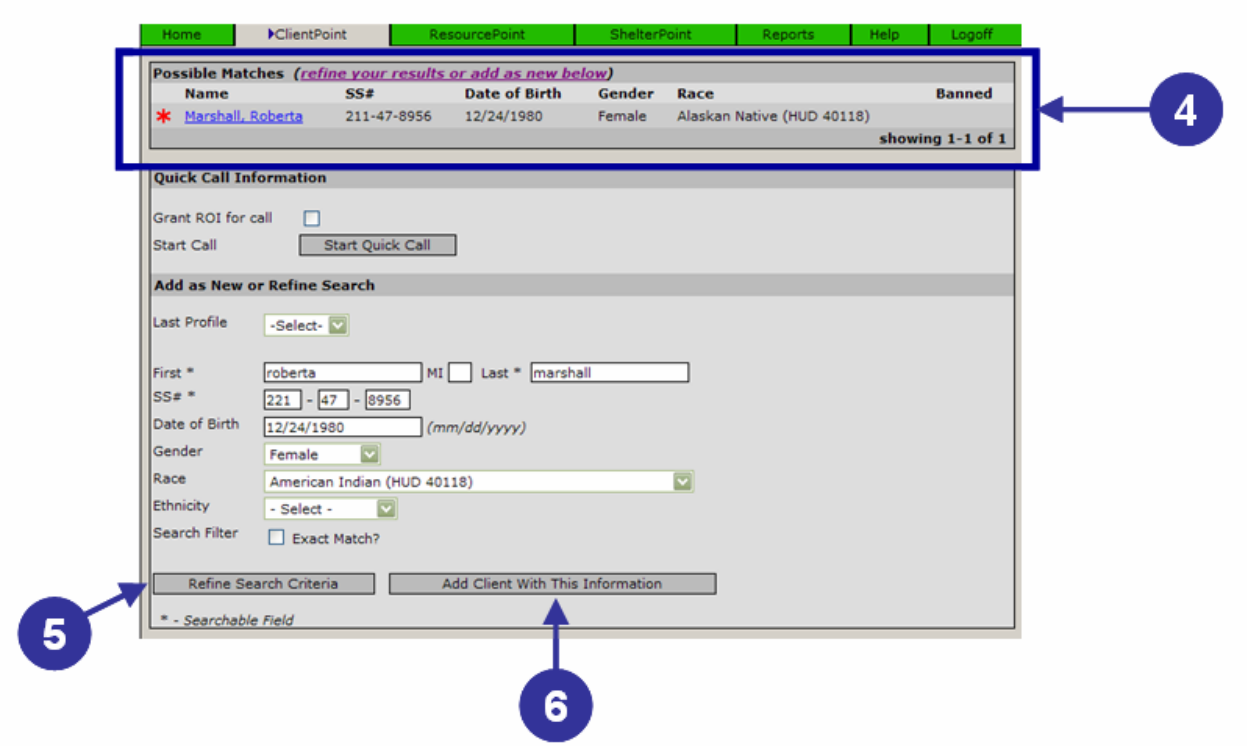

Figure 16: ClientPoint Search Page Results

If the Client record exists, clicking on the name hyperlink in the **Possible Matches** section ❹ (Figure 16) will access the *Client Profile* screen of that Client. Notice that after the initial search, the **Add/Find Client** button changes to read **Refine Search Criteria** ❺. If the results do not match, the User can redefine the search criteria and search again.

In addition, the **Add as Anonymous Client** button has also changed to read **Add Client With This Information** ❻. This button initiates the creation of a new Client record. ServicePoint then provides one last opportunity to verify that the Client record is not already in the system with a confirmation separate popup window. Once the User has confirmed that the Client record does not already exist, a new Client record is finally created.

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CREATING ANONYMOUS CLIENT RECORDS

The **Add as Anonymous Client** button (Figure 15, ❸) can be used if the Client wishes to remain anonymous. This option might be used to create a Client record for anonymous calls to Information and Referral (I&R) agencies or for agencies that serve Clients in potentially sensitive situations such as Domestic Violence or HIV counseling. However, careful consideration should be given to adding Clients as anonymous, as this feature can potentially create duplicate Client records.

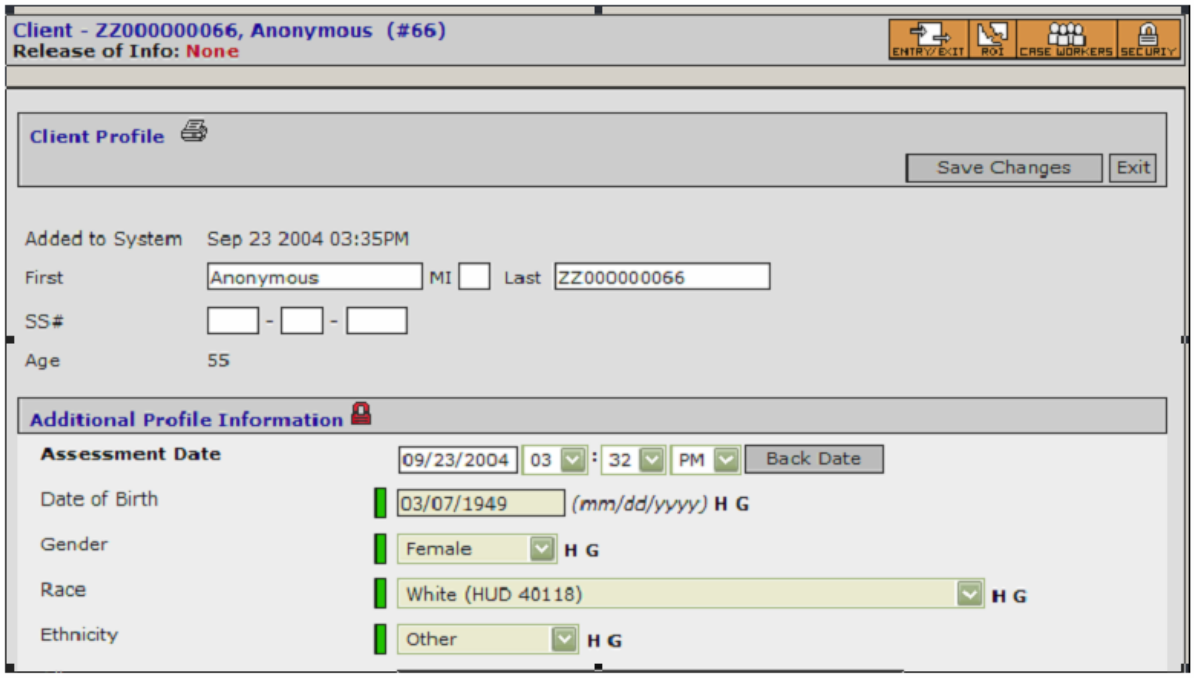

Figure 17: Client Profile of Anonymous Client Record

For example, a Client who is entered into ServicePoint as "anonymous" at the HIV Clinic, but is entered as "Robert Johnson" at the Food Bank, will have two irreconcilable records in ServicePoint. Each of his records is "filed" according to two distinct Unique IDs.

Unique IDs for Anonymous Clients are created slightly different from other Clients (Figure 17). The first name of an "anonymous" Client is changed to 'Anonymous' and the last name is changed to "ZZ0000000123" where "123" is a system-generated static ID number assigned to all Client records.

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The example below shows how information would be converted to create an Anonymous record.

Table 4: Client Search Criteria

First Name	Last Name	Date of Birth	Sex	Static ID
Josh	Jones	10/11/1960	Male	66
Jane	Jones	Blank	Female	67
Joseph	Jones	Blank	Blank	68

Table 5: Results When Client Added As Anonymous

First Name	Last Name	Unique ID
Anonymous	ZZ000000066	ZZ000000066
Anonymous	ZZ000000067	ZZ000000067
Anonymous	ZZ000000068	ZZ000000068

If an Anonymous Client record is created, the only way to access that record in the future is to take note of the new "Last Name" and use it as the search criterion (unless the User has access to SkanPoint – more on this later in the course).

If using the Anonymous Client feature, Users may want to create a custom assessment question to capture the Client's actual name. This can then be used to verify that the User has accessed the correct record. (Please see the Assessment Admin section for details on how to do this, and the Security section for details on how to secure this and all other custom fields.)

CLIENT PROFILE

The Client's record is comprised of four "screens," or "sub-modules", of the ClientPoint module (Figure 18). The first "sub-module" is the Client's **Profile** ❶ screen. Some of the essential aspects of the Client's record found on this page include: the Client's name and Static ID number ❷ & ❸, the time remaining (if any) on the current Release of Information (see below for further explanation of the ROI), and the date and time the record was created.

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The **Additional Profile Information** ❹ Assessment is one of numerous Assessments that System and Agency Administrators can choose to display on this page. Some Providers may choose to create a "Basic Intake Form" Assessment to be displayed on the **Profile** screen.

Always remember to save your work! You will find a **Save Changes** ❺ *button on most pages. Movement within a Client's record will activate an automatic* **Save Change** *action.*

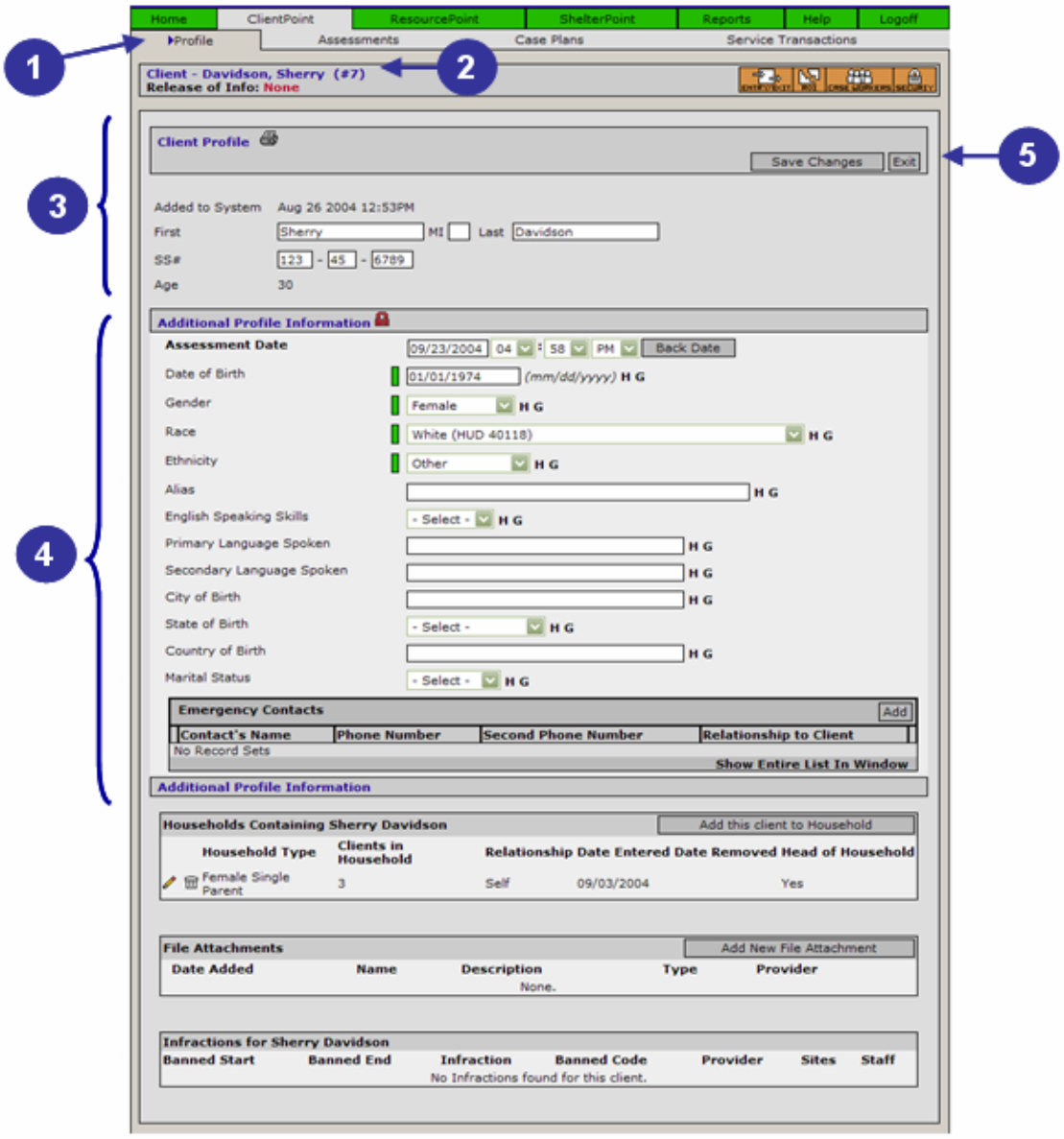

Figure 18: Client Profile of Client Record

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VIEW AND EDIT ICONS

Throughout ServicePoint, you will encounter icons that indicate the ability to perform a specific function for a Provider or Client record.

VIEW, EDIT, AND PRINT ICONS		
*	**Provider Creating**	Indicates the Client record was created by the User's default Provider.
	View Detail	Opens item for viewing.
	Print	Converts the item to a print-friendly version of the page currently displayed.
	Edit	Opens entry for editing or viewing of additional information.
	Delete	Removes the information.

Table 6

The **View Detail**, **Edit** and **Delete** icons are security-sensitive and will only appear if the User has permission to perform the function.

DATA FIELD TYPES

Using data field types helps to ensure reliable information retrieval and reporting by facilitating a consistent method of data entry. There are a number of data fields used for storing Provider and Client data.

The types of data fields encountered in ServicePoint are:

FIELD NAME	DESCRIPTION	FORMAT/LIMITATIONS
Text	Accepts any text characters	Maximum characters vary from field to field
Date	Accepts valid dates. The year must be entered as four digits	m/d/yyyy or mm/dd/yyyy
Checkboxes	Allows user to select more than one option	None
Radio Button	Allows user to select one option	None
Dropdown	Allows the user to select from a list of options	None

Table 7

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SECURING CLIENT DATA

ServicePoint offers several options for sharing or hiding information collected by a Provider. Administrators can share or hide Client information using default Provider security settings, and End Users can establish Client-specific security on specific data elements they enter into the system, if he/she is given permission to do so. (see the chapter on Administration)

STATUS ICONS

As you move through security sensitive areas of your system, Users will encounter icons that inform them of the security status of specific data elements.

	Open	Record or data area is viewable by all users.		**Open with Exception**	Viewable by all Users except those attached to the Providers listed as "exceptions".
	Closed	Record or data area is viewable only by Users of the Provider that created the record.		**Closed with Exception**	Viewable only by Users of the Provider that created the record and Users of the Providers listed as "exceptions".

Table 8

RELEASE OF INFORMATION ICON

A Release of Information (**ROI**) is required in order to share Client information with other Providers in your community. This is a failsafe feature against the inadvertent sharing of Client information. The ROI within ServicePoint is Client-specific, Provider-specific, and duration-specific, and serves as an integral part of the ServicePoint security model. In order to trigger a Provider's default security settings for Client information, a ROI must be entered into the system. (Please see the Admin Providers section of this course for a complete discussion of establishing a Provider's "Default Restrictions and Exceptions", sometimes called the "default security settings" or the "default sharing agreements.") (Figure 19 below)

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The ROI "trigger-functionality" is an optional function which is set at the system level by Bowman Systems. If deactivated, Client information will be viewed or not viewed based on the Provider's default security settings and does not require the User to enter an ROI. It is highly recommended that this functionality remain activated to ensure that unauthorized sharing of Client information does occur.

If you wish to turn the ROI functionality off, please contact your Bowman Systems representative to request this change prior to installation, update, or upgrade.

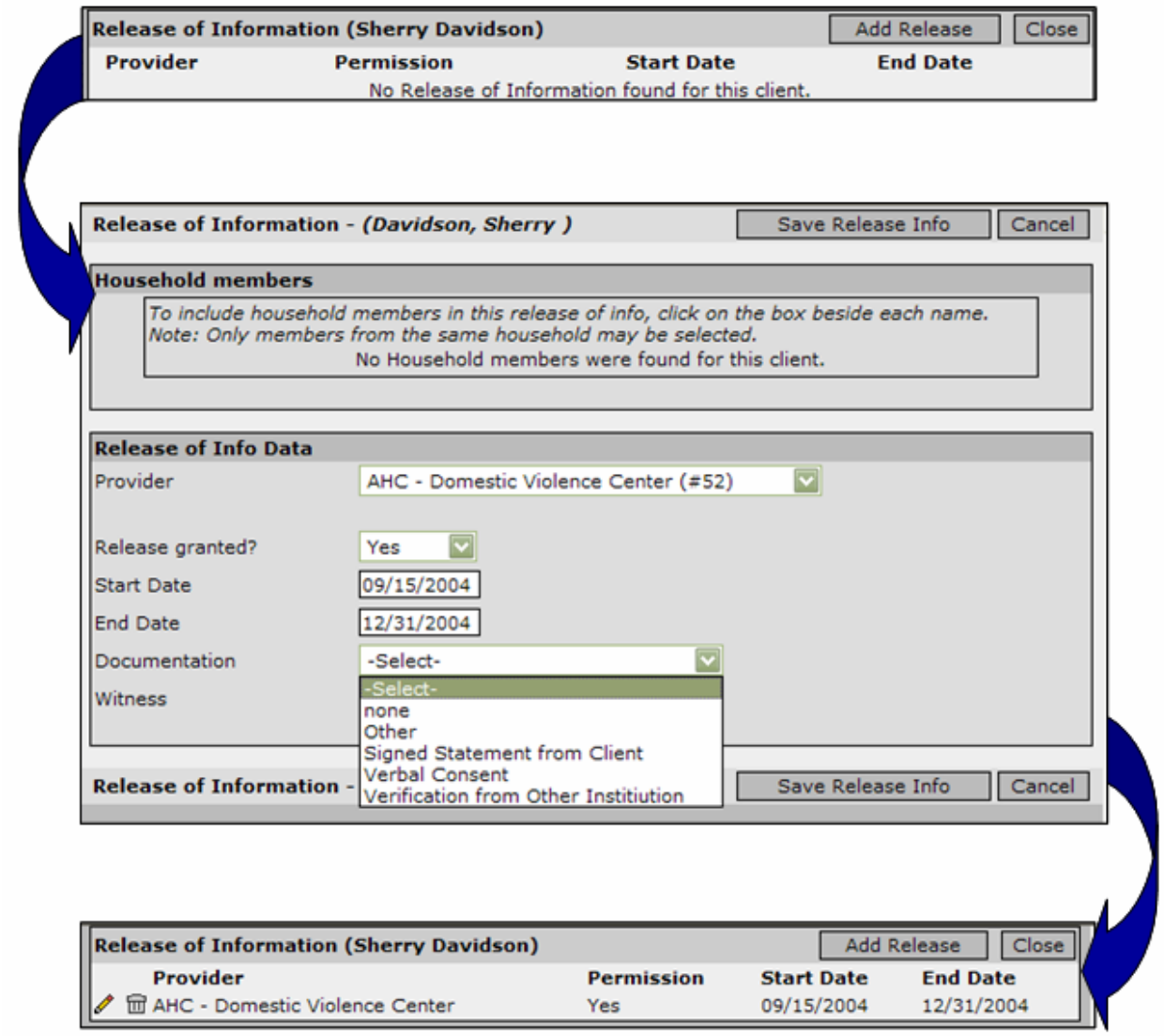

Figure 19: ROI Popup Windows

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Once a ROI is recorded, the **Release of Info** under the Client name will change to green for an active ROI or red for an expired ROI. In addition, the time remaining for the ROI is also indicated as shown in Figure 20 and 21 below.

Figure 20: Active ROI

Figure 21: Expired ROI

HISTORICAL AND GOAL INFORMATION

ServicePoint tracks not only current Client information, but also all historical answers entered into Assessment questions. When the user clicks on the **H** (View History) symbol located to the right-hand side of the desired field, a popup will appear which displays all previous answers given to the chosen question. This popup displays the date the answer was entered into ServicePoint, the User who entered or created the answer, the Provider for which that User was entering data when the answer was entered, and the answer itself.

The ability to view Client historical information is dependent on the security settings of the Provider that entered the information and the access level of the User trying to access the historical information.

If the

(No ROI) appears next to a historical answer, then none of the Provider's default security settings have been applied to that answer.

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The G (View Goal) symbol within a Client record allows Users to quickly create a Goal that is identified during the assessment process. *Goals are covered in detail in the Case Plan section of this chapter.*

INFORMATION AGING

The **Answer Age Bar**, located on the left-hand side of a field that contains User-entered data, is a visual clue of the age of the answer. Coloring ranges from solid green to a combination of green and orange to solid orange as time elapses. Green represents the most current answer and orange represents data that is close to a year old.

90 Days or Less SOLID GREEN
91-360 Days GREEN TO ORANGE
Over 360 Days SOLID ORANGE

This visual clue allows Users to quickly identify questions that may need to be updated, e.g. residential, employment, and/or emergency contact information.

ENTER CLIENT INTO "PROGRAM" ICON

ServicePoint has the ability to indicate a Client's participation in various "programs" by using the Entry/Exit functionality. This feature of ServicePoint simply creates "bookends" for the duration of a Client's "enrollment" in a "program" – where a "program" is defined by each Provider. There are five "types" of Entry/Exit: Basic Entry, Standard Entry, Quick Call, HUD-40118, and PATH (new with version 3.06).

- Basic and Standard types of Entry are not tied to any of ServicePoint's "canned" reports, so their meaning must be defined by policy at the Provider level.
- A Quick Call Entry is automatically created when the Quick Call feature is used. (Please see the section on Quick Calls.)

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- The HUD-40118 and the PATH Entry types are tied directly to ServicePoint's "canned" HUD APR and PATH Report, respectively. In order for Clients to be included in either of these reports, they must be given either a HUD-40118 Entry or a PATH Entry.

The function of an Entry/Exit, particularly a HUD-40118 Entry/Exit, is to take a "snapshot" of a Client's status the day he/she entered a program and then again when he/she exits a program. ServicePoint's "canned" HUD APR will compare the Entry data with the Exit data according to HUD's requirements.

Accurate reporting is dependent on the Case Manager's accuracy in maintaining Entry and Exit program information for each entered Client.

For Clients to be counted as Family Members in the HUD APR, a Household should be created before creating a HUD-40118 Entry. Creating a Household is covered in the Linking Household Members *section in this chapter.*

For more details on the data entry requirements for accurate HUD APRs, please see the HUD APR Tech Note.

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In the example below, the HUD 40118 Assessment has been chosen to show on both the Entry and Exit screens. (Figure 22)

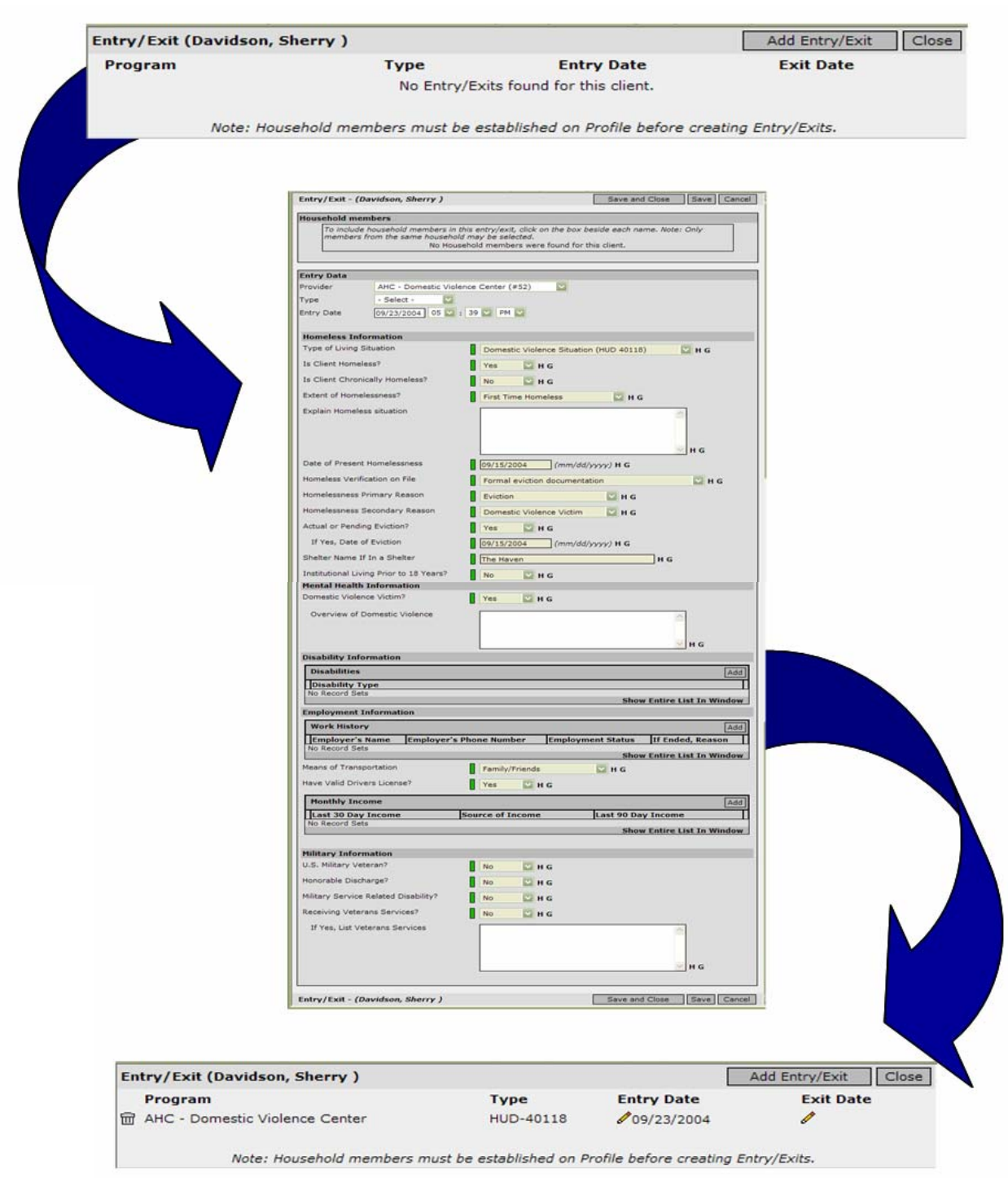

Figure 22: Entry / Exit Popup Windows

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CASE WORKER ICON

The **Case Workers** feature allows Users to attach Case Worker contact information to the Client's record. This feature can facilitate better coordination among the various individuals performing a Client's case management. The **Case Workers** icon opens a popup in which contact information can be stored. (Figure 23)

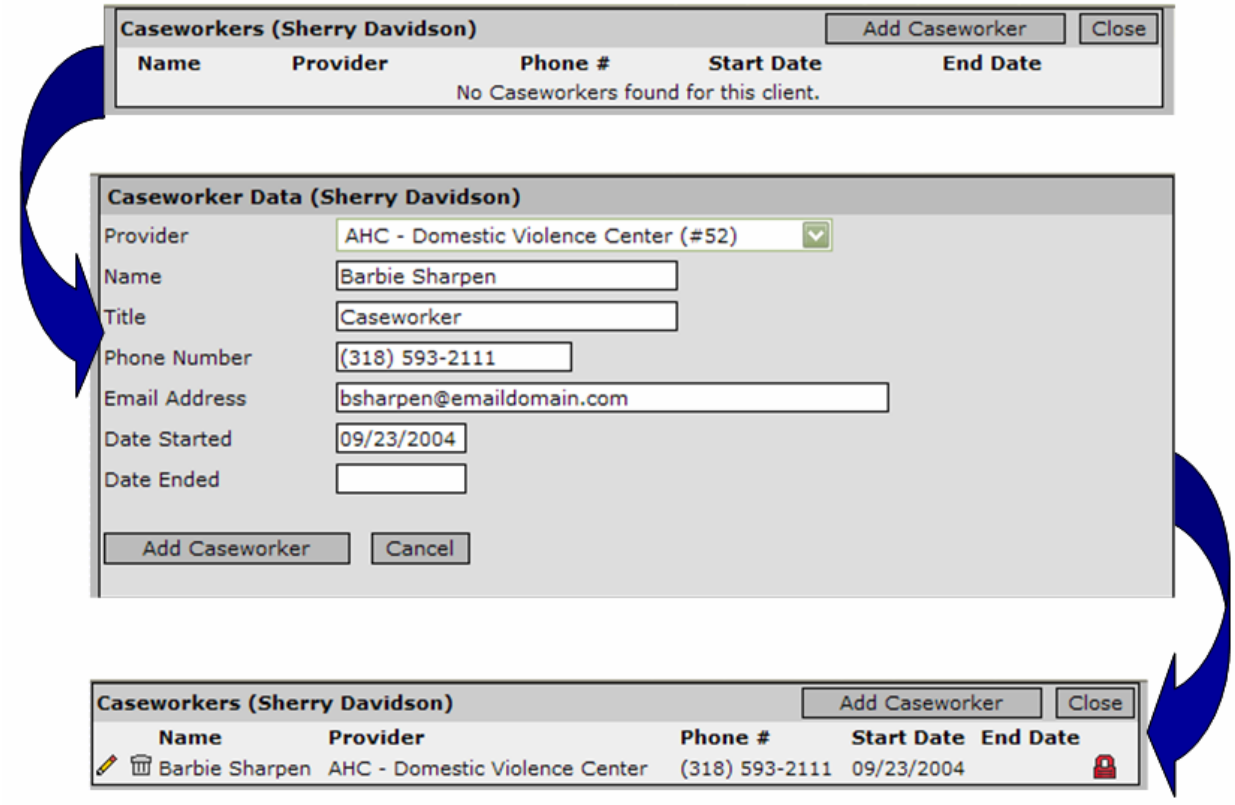

Figure 23: Case Worker Popup Windows

To change the default security setting for the caseworker contact information, click the to display the security setting for the Caseworker area and select the **'To OPEN this record click here.'** Hyperlink (Figure 24 below). The lock changes to . If this information was open, the hyperlink would read **'To CLOSE this record click here.'**

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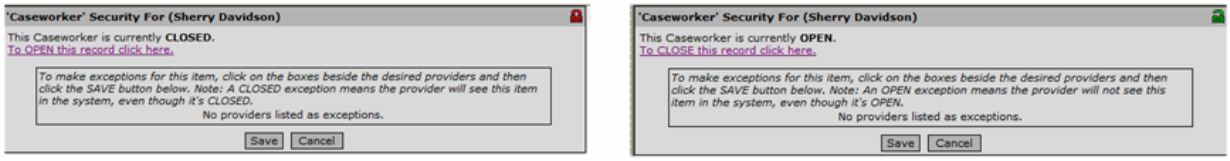

Figure 24: Security Open and Close Screen

This Client-specific data element can have its own set of default security settings applied to it. Please see the Admin Providers section of this course for further clarification.

SECURITY ICON

There may be an occasion when it is necessary to change the security of a Client's entire record from the Provider's default setting. The Security Icon gives the User the ability to override the default setting to either ***close an open*** Client record or ***open a closed*** Client record. To change the default security setting for the Client record, click the orange security icon.

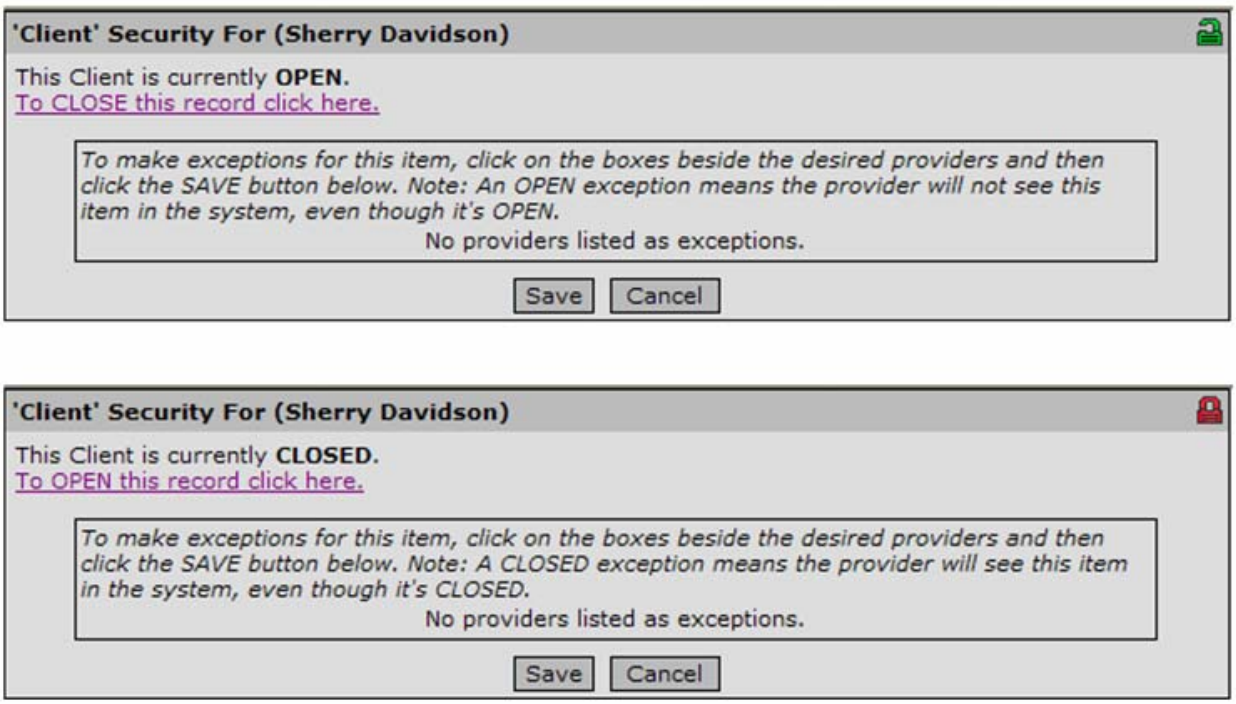

Figure 25: Security Assignment Popup Windows

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In Figure 25 above, the initial status of this Client's record is *Open*. By selecting the hyperlink "**To Close this record click here.**", the record will be *Closed* to all Providers unless there are other Providers designated as exceptions by the Administrator. Providers that are exceptions to the security "rule" are listed with a checkbox on the left-hand side. Applying these "exceptions" is simply a matter of putting a checkmark next to the desired Providers.

When a Client record is shared by two or more Providers, only the System Administrator will be able to close the entire file. In such cases, the following note is displayed:

Note: This Client is shared by other Providers and cannot be restricted by your agency. You may, however, restrict other pieces of data you add for this Client individually such as assessment data and Services. In extreme circumstances, your System Administrator may restrict this Client for you.

LINKING HOUSEHOLD MEMBERS

ServicePoint uses the "Household" feature to associate individuals. Generally, this feature is reserved for grouping family members, however, non-family members can be tied together using this feature as well. A good rule of thumb is to group individuals into a Household who receive Services together on a regular basis in order to facilitate more efficient data entry. To associate Clients using the Household feature, the User only has to perform one action to enter a ROI, create an Entry, create Goals, and/or record Services provided to all Household Members. Without this added functionality of the Households feature, Users would have to perform each of the above functions for each Client individually, which could result in incomplete data entry if the User forgets to enter the information for each Household member separately.

Starting a New Household

Figure 26: Household Section of Client Profile

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The first step in setting up a new Household is to click on the **Add this Client to Household** button (Figure 26). This opens the **Add Client** to Household popup window (Figure 27). This popup prompts the User to determine the Household Type, whether the Client is the Head of Household, and the Client's relationship to the Head of Household.

The Head of Household designation merely serves as the "center spoke" in the "family wheel." All Household Members will be "defined" in relation to the Head of Household to facilitate a quick understanding of the family relationships (Figure 27). The "Date Entered" is automatically populated with the current date and refers to the day the Household was created in ServicePoint (not, for example, the day a child was born or the day two individuals were married, etc). The "Date Removed" is typically left blank unless the Member no longer receives Services as part of this Household.

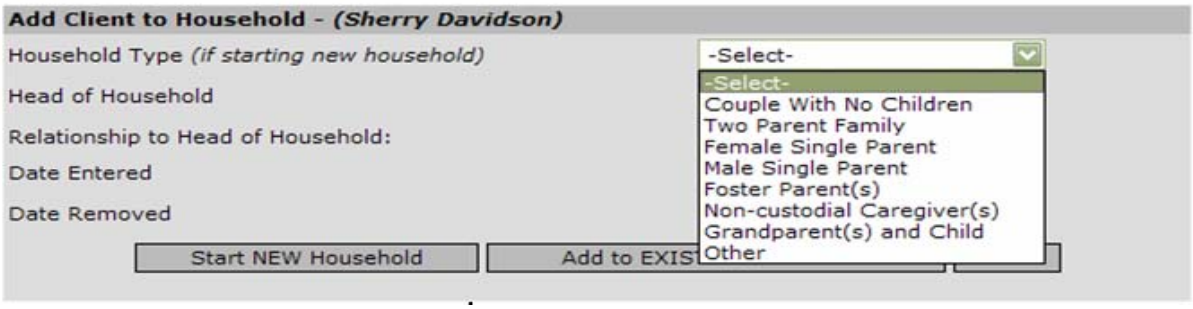

Figure 27 Options for Household Type

Options displayed in many of the dropdown lists can be customized. This is covered in the Refining Your Picklist section of this course.

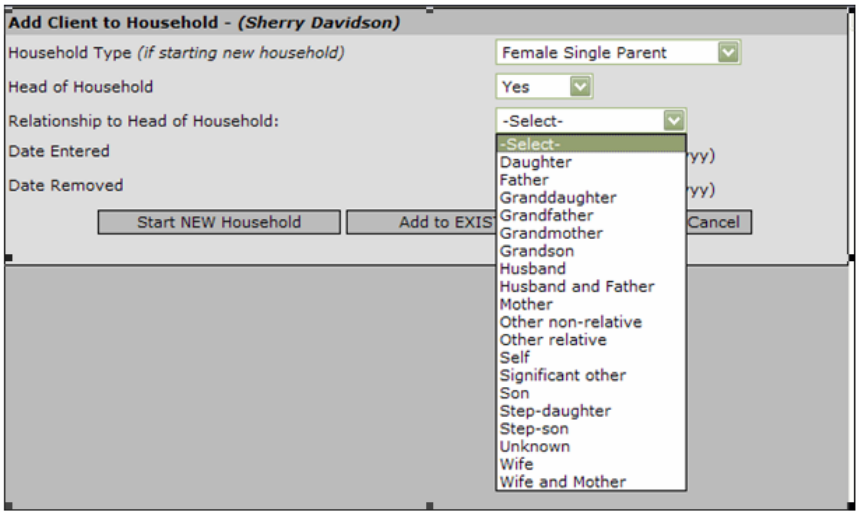

Figure 28: Dropdown List for Head of Household Type

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ADDING TO AN EXISTING HOUSEHOLD

Once the Household has been created, it is an easy process to add other Members. The User can either add a Client who already has a ServicePoint record or can create a new Client record from the following screen (Figure 29). Notice that the bottom section of this popup is the same as the ClientPoint search screen.

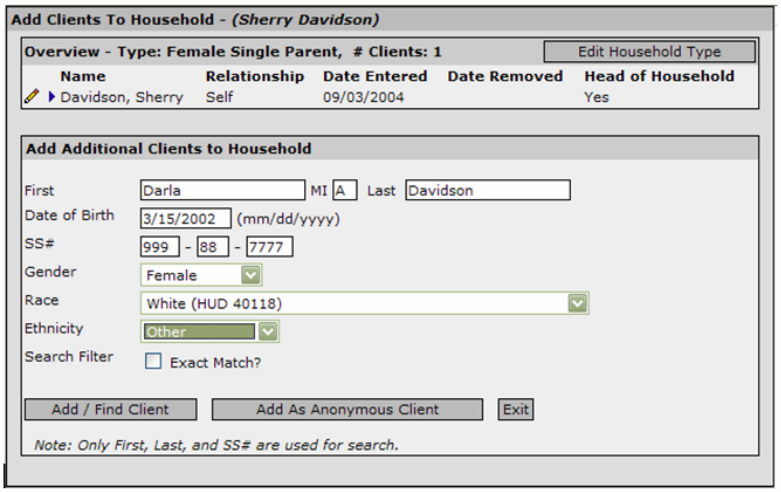

Figure 29: Search for Adding Client to Household

If ServicePoint does not find a "Possible Match" to the User's search, the User will be prompted to create a new record. (Figure 30)

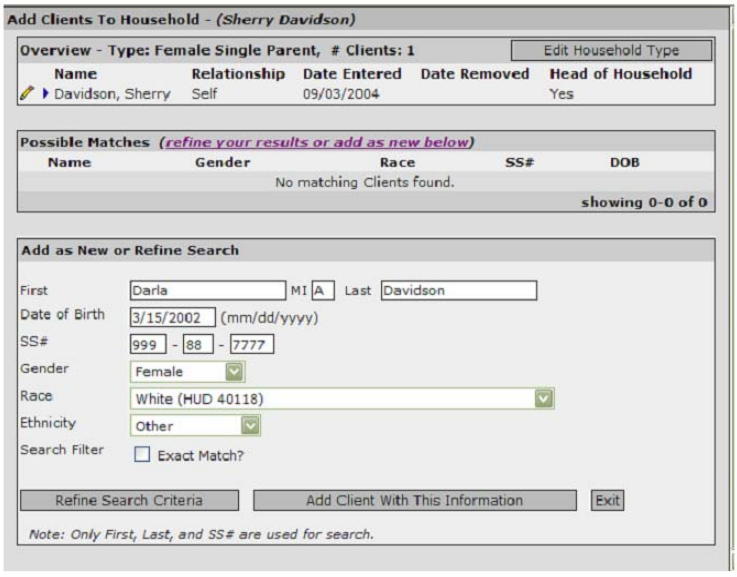

Figure 30: Search Result for Household Member (No Match)

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Once a new Client record has been completed, or an existing Client's record has been selected, the User must "C**ontinue Adding Household Member**" by defining this Client's relationship in the Household. (Figure 31)

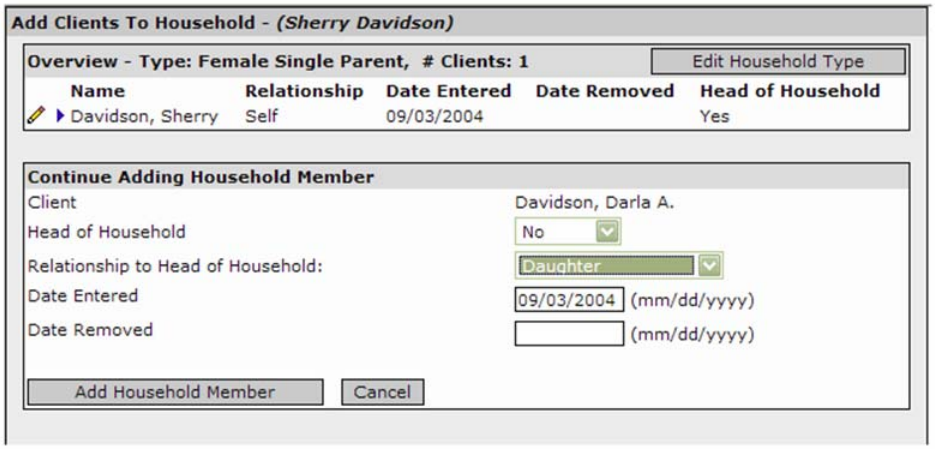

Figure 31: Screen to Define Household Member's Relationship to the Household

Clicking on the Edit Icon (the "pencil") next to the Client's name will allow the User to edit the Client's relationship in the Household (Figure 32). This will also allow the User to "toggle" back and forth between the Household Members. When a User clicks on the Edit Icon, the main screen will refresh in the "background" and will now display the selected Client's record. This feature helps speed up data entry since it bypasses the need to return to the ClientPoint screen to search for a Household Member.

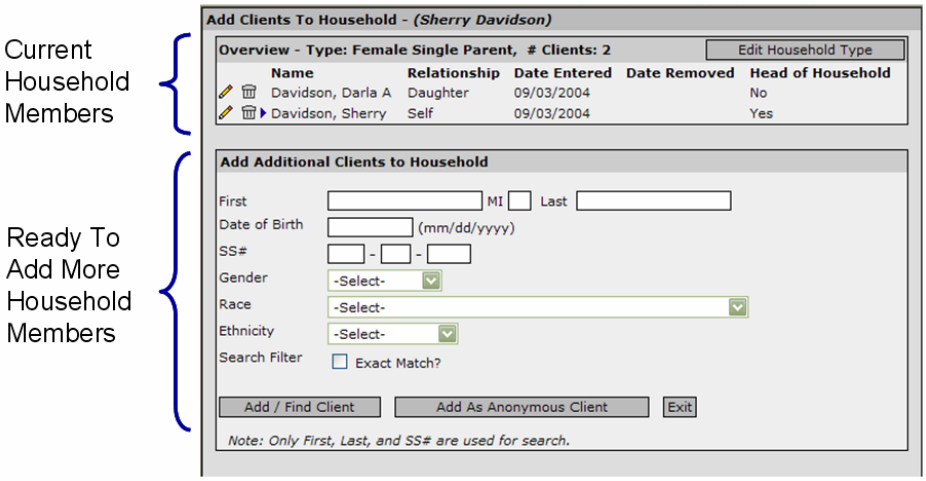

Figure 32: Completion of Add Household Task

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ATTACHING FILES

ServicePoint provides the ability to attach electronic files to a Client record. Most of the common file formats are compatible, including those from scanned documents or pictures. This feature works exactly like attaching a file to an e-mail (Figure 33). Simply point to the file using the **Browse** button and add a description to identify the file. By using the **Save** button, several files can be added while in this screen. Once you have attached all the files desired, use the **Save & Exist** button to save the file shown and then return to the *Client Profile* screen. You can return to the **Client Profile** without saving a chosen file by clicking the **Cancel** button.

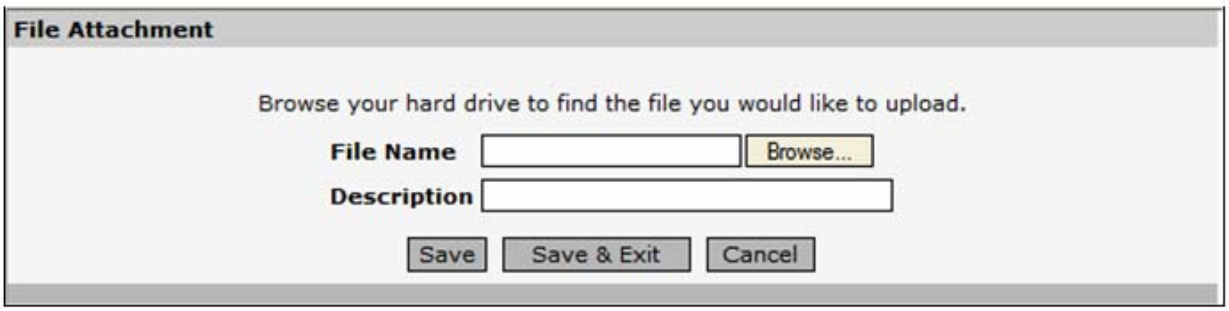

Figure 33: File Attachment Popup Window

Attaching a "jpeg" or "jpg" file to a Client's record with the words "client" and "photo" anywhere within the file Description will prompt ServicePoint to place the picture on a Client's ID card.

The User must have permission to use the SkanPoint module to generate a Client ID card. However, access to SkanPoint is not required to attach a photo to the Client's record. See the Creating Client ID Cards section of this course for more detailed information.

CLIENT INFRACTIONS

Only System and Agency Administrators can enter client Infractions. Infractions serve as a point of information concerning a violation of a rule associated with a particular Provider. It does not

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activate or deactivate anything within the system. It simply allows communication about past Client behavior for consideration when providing Services.

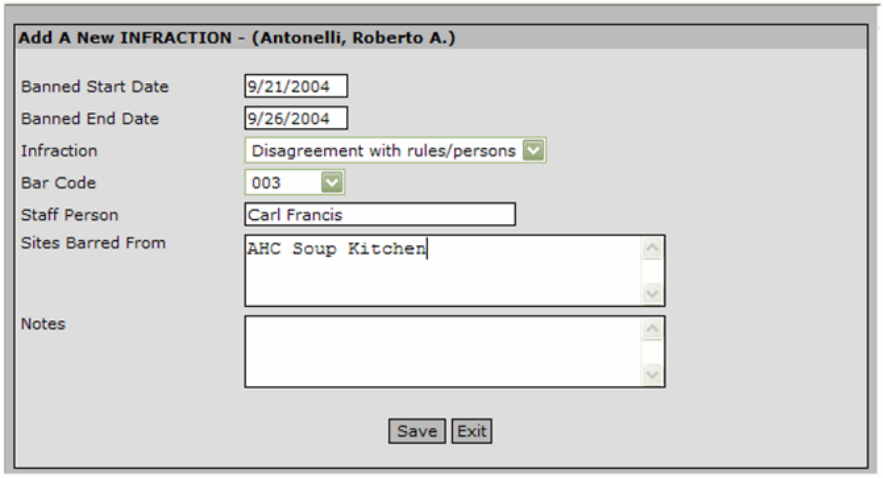

Figure 34: Add New Client Infraction Screen

An infraction indicates the duration of the "ban", the type of infraction, the bar code (defined by each Provider), and provides a space for notes to be recorded. (Figure 34)

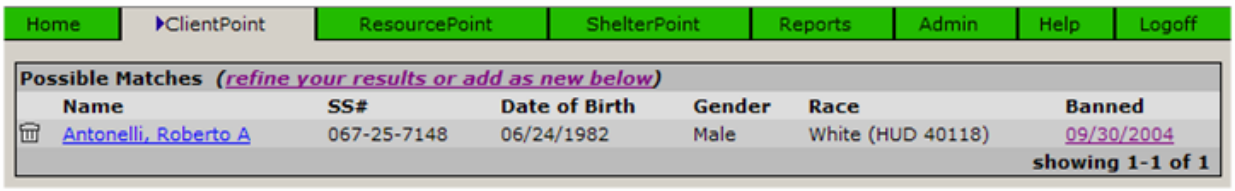

Figure 35: Possible Matches Screen of Client Record with Banned Date

When pulling up a Client's record, the "ban" is noted, although the reason for the ban is not shown.

Please note that even though Infractions are listed in the "Banned" column, ServicePoint does not in any way prevent a Client from being served simply by the presence of an Infraction. This is nothing more than a point of information.

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THE CLIENT ASSESSMENT PAGE

Assessments are "questionnaires" that collect topic-specific data about a Client. ServicePoint provides Users with several "canned" Assessments that may be used as is or modified according to the needs of the ServicePoint community. ServicePoint also provides System Administrators the ability to create their own "custom" Assessments.

The Assessment screen is a "sub-module" of ClientPoint. It is accessed by selecting the "Assessment" **hyperlink** tab located under the Navigation Bar at the top of the screen. A default

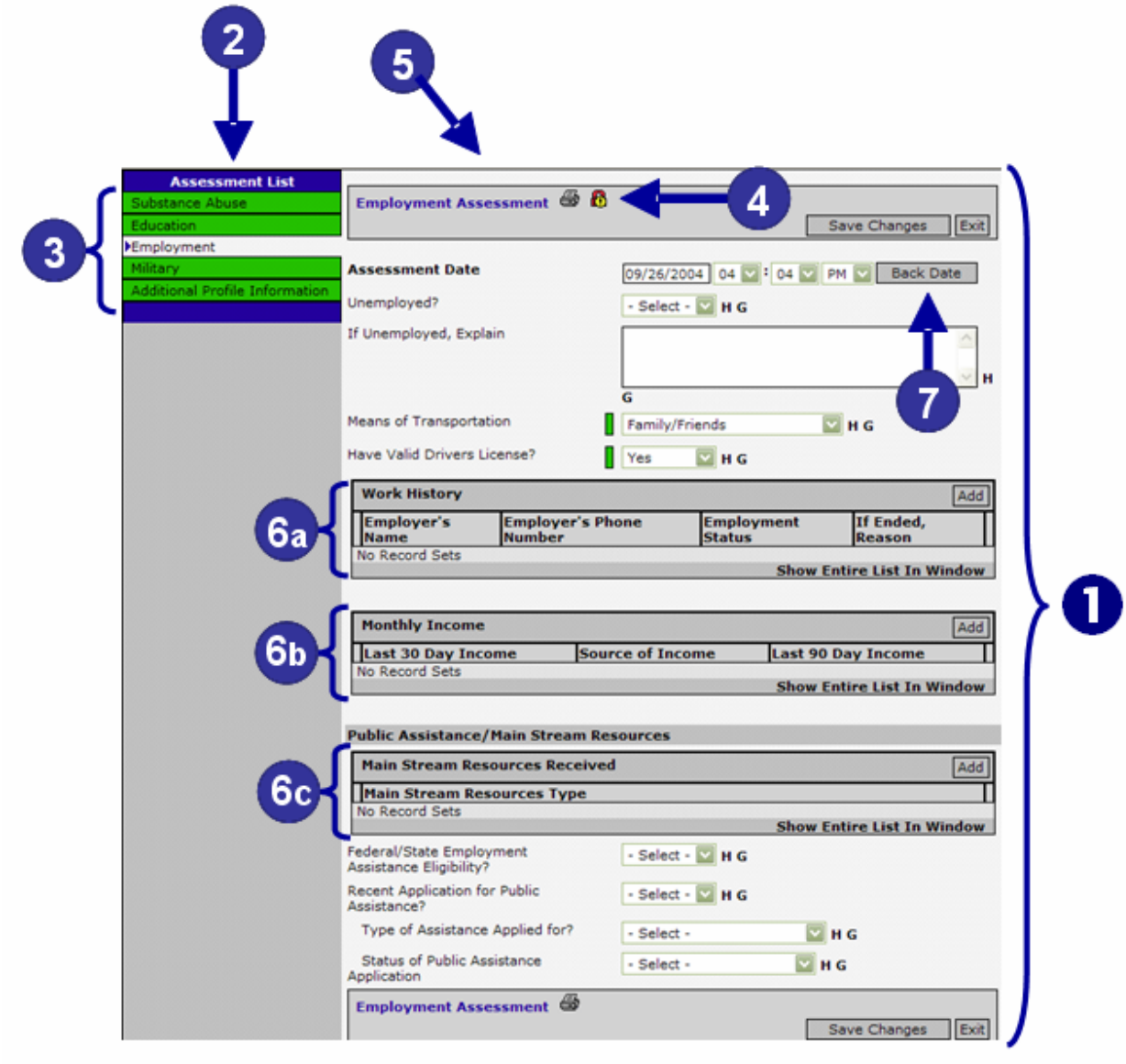

Figure 36: Employment Assessment Page

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Assessment ❶, determined by the Agency Administrator, is automatically displayed when the Assessments tab is selected (Figure 36 above). The left-hand side of the page displays the **Assessment List ❷,** which contains **hyperlinks** to all other Assessments to which the Provider has access.

Users who have the ability to enter data for more than one Provider may see different assessments, or depending on the configuration of the Provider for which he/she is entering data, they may see assessments listed in a different order ❸.

Assessments are subject to each Provider's default security settings, however, Users can be given special permission to change the Assessment's security settings for their particular Clients❹. Such changes are not retroactive. The new security setting will apply only to new information entered in that Client's record. For more information on how to give Users this permission, please see the User Account Configuration section of this course.

ServicePoint will also print a page in printer-friendly format when the print icon ❺ is selected.

It is the User's responsibility to protect Client information that is printed and to dispose of it properly in accordance with approved policy and procedure.

Many of the Assessment topics have sub-assessments that allow the User to enter multiple items of related information. In Figure 36 above, there are three "sub-assessments"❻a-c. Each sub-assessment permits multiple entries related to Work History, Monthly Income and Public Assistance.

BACKDATING

Since many Users are not able to enter data into ServicePoint at the time the data is collected, ServicePoint has a feature that allows Users to enter the Client information "after the fact". This feature is called the "Backdate Mode."

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To use the "Backdate Mode", the User enters the actual date on which the Assessment information was collected and then clicks on the Back Date button ❼ (Figure 36 above). The screen will refresh and to indicate that the User is entering data for a day in the past, there will be a bright yellow header and footer surrounding the Assessment. The "Backdate Mode" applies to Assessment information only. All other Client-specific data elements (i.e. Needs, Services, Goals, etc) can be "backdated" by simply changing the date when entering the information into ServicePoint.

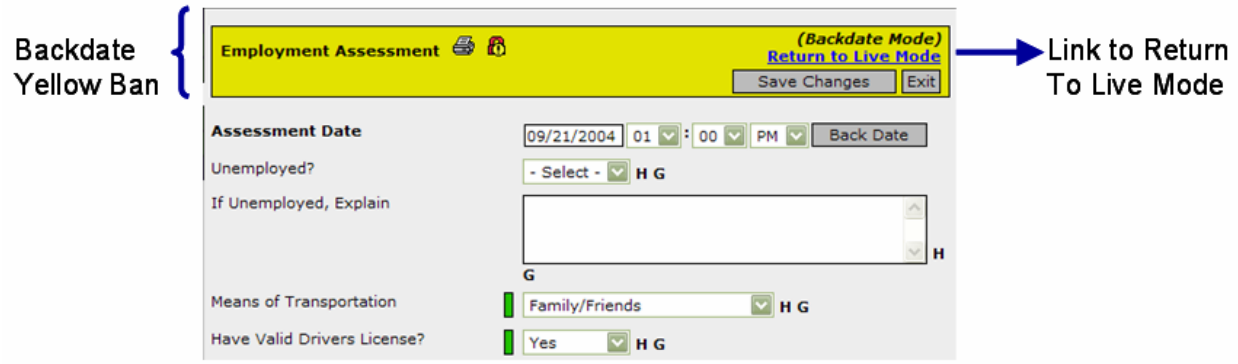

Figure 37: Assessment in Back Date Mode

To return to the current system date and time, the User must click on the **Return to Live Mode** link located at the right-hand side of the yellow header. Until this is done, the User will remain in "Backdate Mode".

PROVIDING SERVICES OR REFERRALS USING SERVICE TRANSACTIONS

SERVICES VERSUS REFERRALS

NEEDS, SERVICES, and **REFERRALS** are classified in ServicePoint using one of the four available Code Sets. A **NEED** can be identified by the Client, a Case Worker, or both, as something that the Client requires. Assistance that is provided directly to a Client to meet a **NEED** is a **SERVICE**. If a Provider cannot meet the Client's **NEED,** either because the Provider does not offer the appropriate **SERVICE,** the Client is not eligible to receive **SERVICES** from the Provider,

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or for any other reason, a **REFERRAL** can be made to another Provider that can furnish the appropriate **SERVICE.**

This type of data recording is accomplished in the Service Transactions "sub-module" of ClientPoint. A complete Service Transactions record can provide an accurate picture of the Client's status over time. It can also provide the identification of trends through aggregate counts of identified Needs and documenting gaps in services within the community.

ADDING A NEED

Before a User can record that a **SERVICE** has been provided, he/she must tell ServicePoint that the Client has a **NEED**. Upon entering the Service Transactions page, ServicePoint automatically displays the **Add A Need/Service** Screen (Figure 38). To view the past NEEDS AND SERVICES provided, Users click the **View Past Needs/Services** button ❶. If the Client has been associated with other Household Members, those Members will appear in the **Household Members** section ❷. Users can check the Household Members that will be included with this **NEED**. This minimizes data entry involved in recording the **NEED** for each Household Member individually.

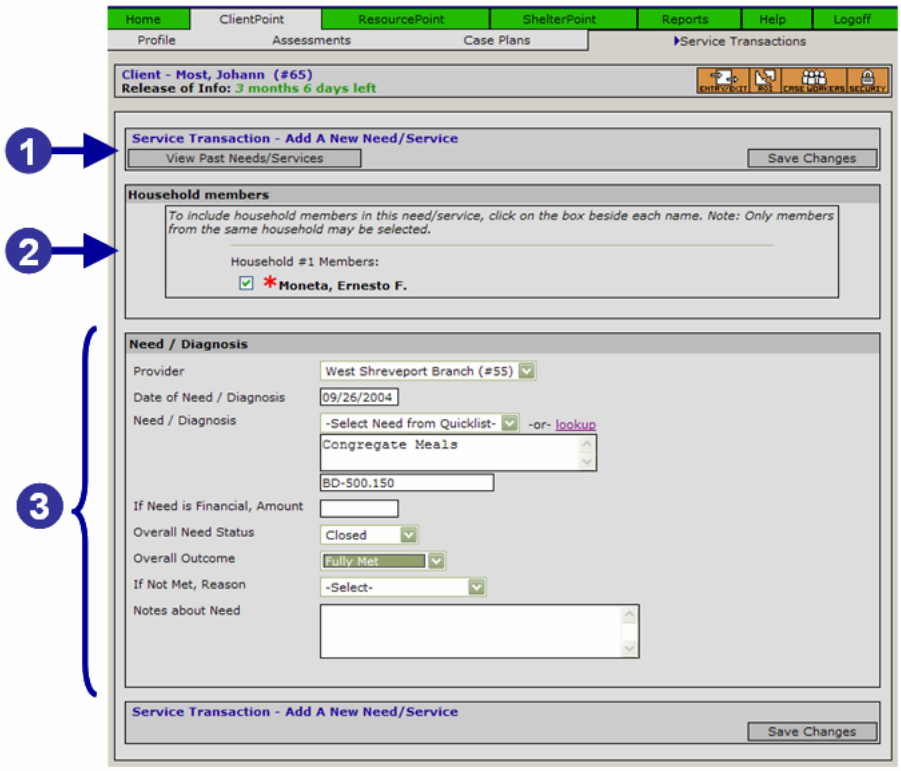

Figure 38: Service Transactions Screen

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The Need/Diagnosis section ❸ records detailed information related to the identified NEED.

Provider:	Automatically displays the User's default Provider. This represents the Provider for which the **NEED** is being entered.
Date of Need/Diagnosis:	Date the **NEED** was identified. If not the current date, be sure to sure to change the date to the date the information was collected from the Client.
Need/Diagnosis:	Code Set term for the Need. Administrators can create a "Quicklist" of codes used on a regular basis. This allows Users to bypass the Code Set search engine.
If Need is financial, Amount:	Dollar amount of a financial **NEED**, e.g. rent assistance.
Overall Need Status:	Picklist used to indicate current **NEED** status. (Required)
Overall Outcome:	Picklist used to indicate if the **NEED** has been met.
Notes about Need:	Area for comments related to the identified **NEED**.

ENTERING SERVICES PROVIDED

Once a **NEED** has been identified and the **View Past Needs/Services** button is clicked, the screen expands to allow Users to record the **SERVICE** or make a **REFERRAL** to another Provider. (Figure 39)

The User can record the **SERVICE** that was provided by clicking on the **Add Service** button of the **Services Provided for Need Identified** section of the screen. A popup window (illustrated in Figure 40 below) allows the User to record the details of the **SERVICE** that was provided. These include the following: the Provider that is providing the **SERVICE**, the code set term identifying the **SERVICE**, and the Start and End date of **SERVICE**.

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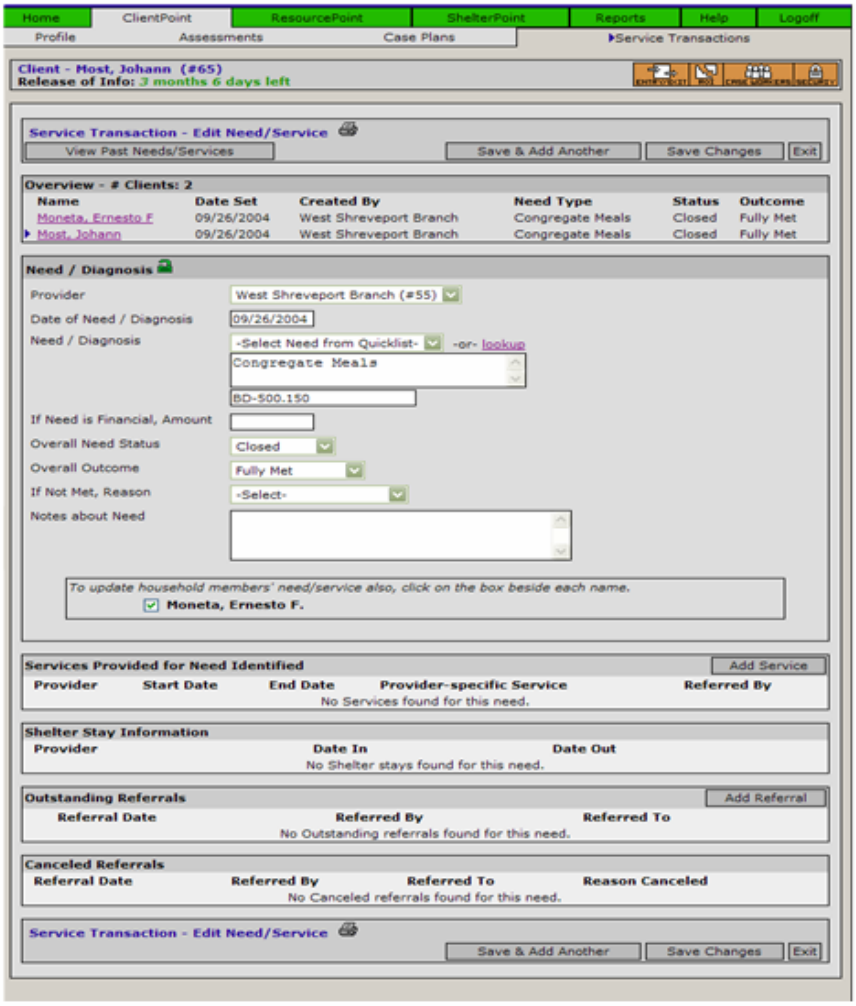

Figure 39: Service Transaction Page after Defining Need/Diagnosis

If the Client belongs to a Household, the User can record this **SERVICE** for any or all of the other Household Members by putting a check mark next to each Client's name. If the Provider has been configured with a **Service Quicklist,** the User can bypass the Code Set search engine. If there is a cost associated with the **SERVICE**, users can specify the dollar amount broken down into up to two funding source.

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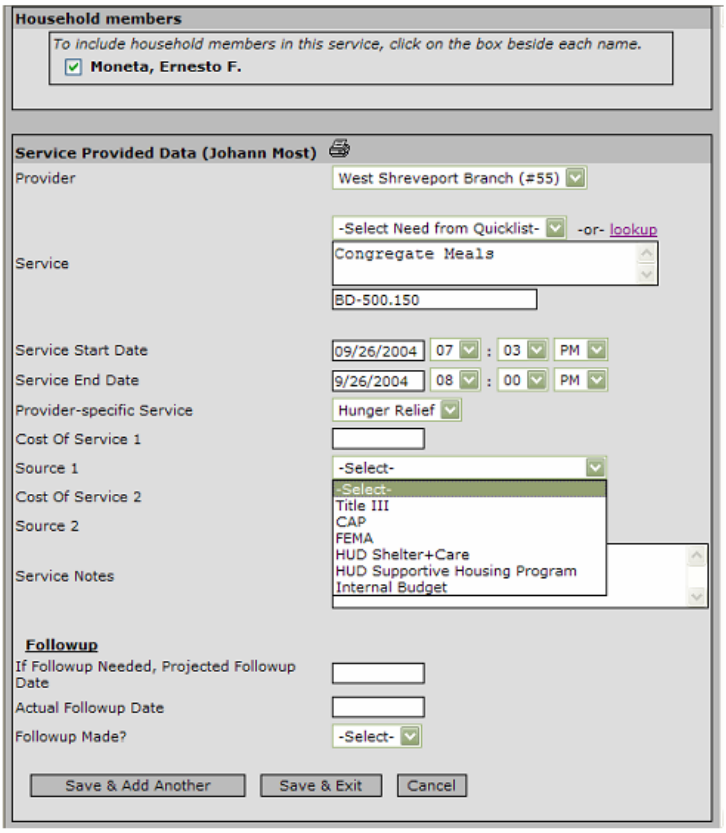

Figure 40: Service Provided Screen

Users have the ability to **Save and Add Another Service**, **Save and Exit** or to **Cancel** the **SERVICE**. Once the **SERVICE** has been saved, the popup will close and the main screen refreshes displaying the **SERVICE** recorded in the **Services Provided for Need Identified** section of the page (Figure 41).

Figure 41: Services Provided for Need Identified Section of the Service Transactions Page

The **Shelter Stay Information** section displays ServiceTransactions that are captured when a Client checks into a Shelter. *For more information, see Chapter 5: ShelterPoint.*

Figure 42: Shelter Stay Information Section of the Service Transactions Page

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ADDING A REFERRAL

If a Clients' Need requires Services that cannot be provided by the User's Provider, **REFERRALS** can be made to another Provider (Figure 43). Again, if the Client belongs to a Household, the User can record this REFERRAL for any or all of the other Household Members ❶. Once saved, the REFERRAL is recorded in the **Outstanding Referrals** Section of the Service Transactions screen.

ServicePoint allows Users to make up to five REFERRALS at once. Administrators can create a Provider-specific REFERRAL QUICKLIST that allows Users to bypass the ResourcePoint search engine that is embedded in the Referral popup. If there is not a **Referral Quicklist**, click on the **"lookup" hyperlink** to access the ResourcePoint search engine ❷. Putting a checkmark next to the Envelope ❸ will generate an e-mail notification to the Providers listed letting them know that a REFERRAL has been sent. *Please see the Admin Providers section of this course for details on where to enter the e-mail address for this functionality.*

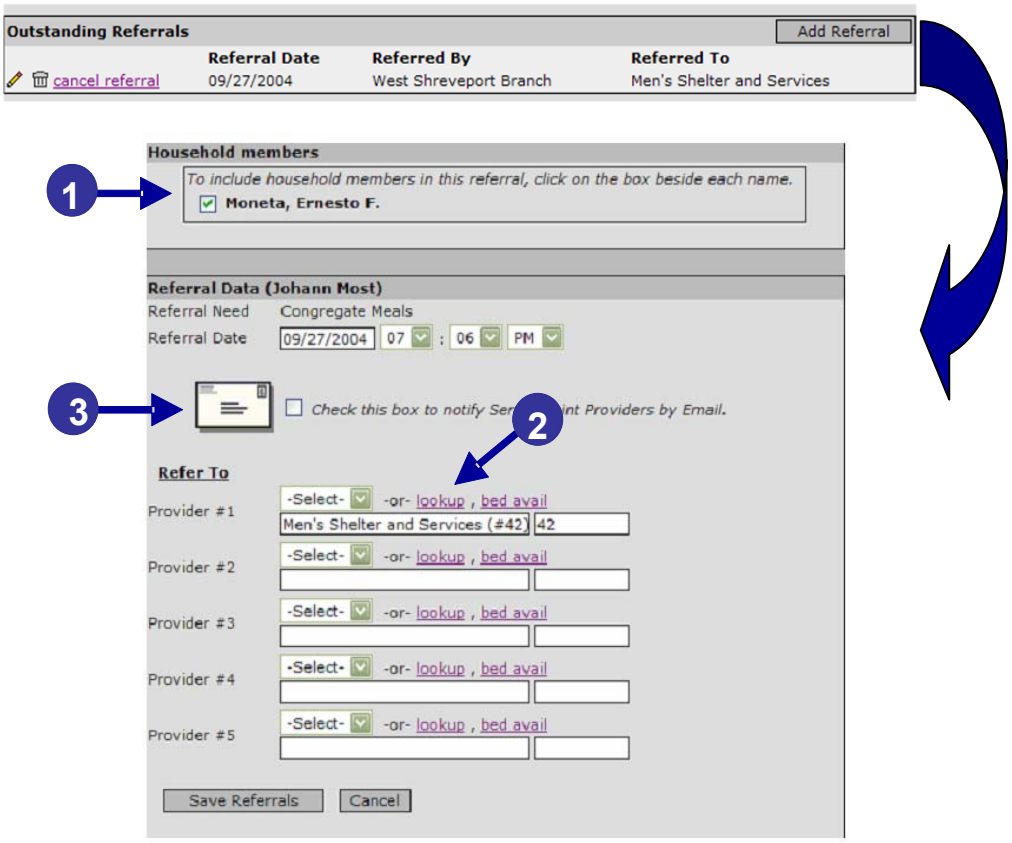

Figure 43: Outstanding Referrals Section of Service Transactions Page and Popup Screen

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CANCELING A REFERRAL

There is a distinct difference between the *cancellation* of a **REFERRAL** and the *deletion* of a **REFERRAL**. Cancellation allows the withdrawal of the **REFERRAL** while recording a reason for the withdrawal. Deletions are performed when an error has been made by the User when entering the **REFERRAL**. A deletion completely removes the **REFERRAL** from the Client's record and no reason for the deletion is recorded. (Figure 44)

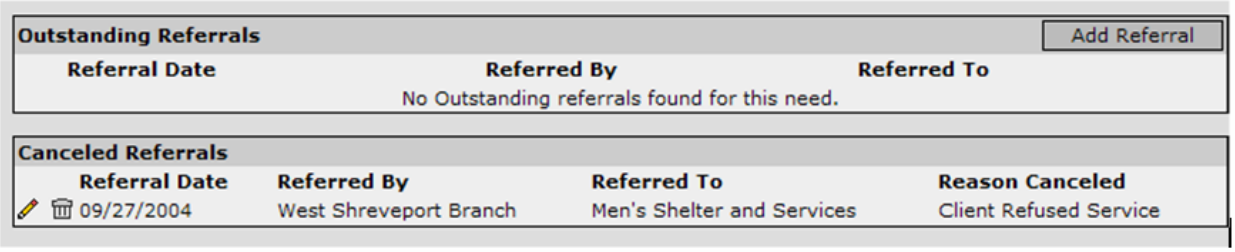

Figure 44: Referral Cancellation Section of Service Transactions Page

CONVERTING A REFERRAL TO A SERVICE

If a User needs to record the fact that he/she has provided a Service to a Client who had been referred by another ServicePoint Provider, he/she must convert the **Outstanding Referral** into a **Service Provided**. To do this, click on the **Edit** icon next to the **Outstanding Referral** into. This opens the **Services Provided** popup window in which the User can enter all information pertaining to the SERVICE that he/she would enter if the SERVICE were not being recorded as a "converted referral" (see the *Entering Services Provided* section of this chapter above).

OPERATING WITHIN THE CASE PLAN SCREEN

The Case Plans "sub-module" of ClientPoint is a "case management" feature that gives the User the ability to set measurable Client goals and objectives, as well as to capture the results of those goals and objectives. With this valuable case management tool, Users can document the strategy designed to help the Client achieve the program or project Goals. In addition, User-specific "followups" can be created to help track a Client's progress toward achieving Goals. (Figure 45)

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Case Plans can be created for one Client or the Client and his/her selected Household Members. When a Household Member is included in the Case Plan, ServicePoint will also create and record Goals for that Household Member.

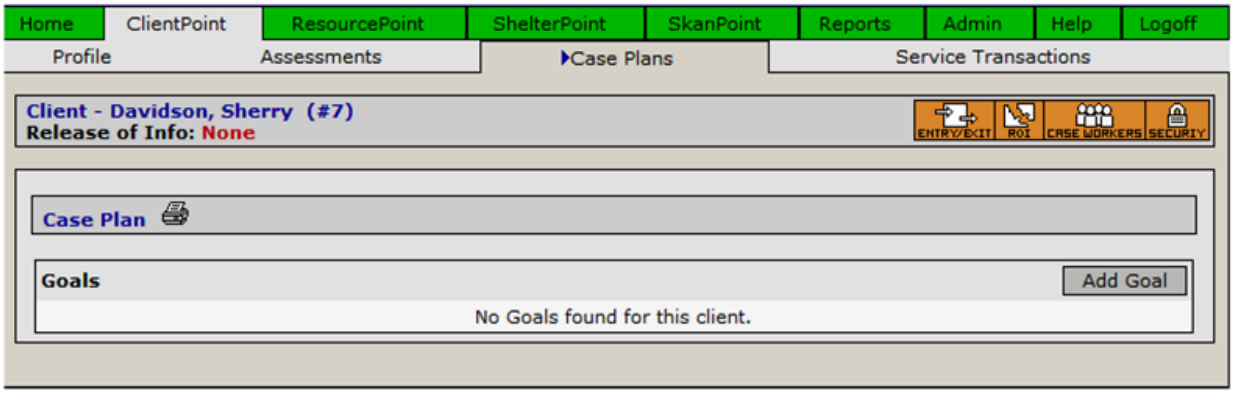

Figure 45: Empty Case Plan Screen

The Case Plans screen lists all Goals entered for the Client (Figure 46). To edit or view additional information on a Goal, click on the **Edit** icon located next to the desired Goal. To delete a Goal, click on the **Delete** icon.

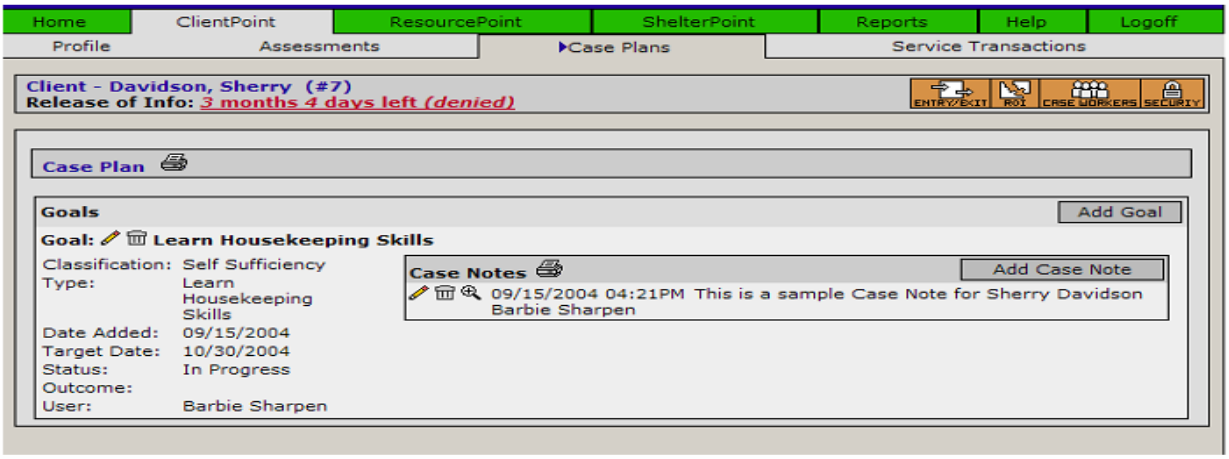

Figure 46: Completed Case Plan Page

Do not delete Goals unless entered by mistake. Deletion of Goals also removes affiliated information related to the Goal, i.e. followups, action steps, case notes, etc.

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GOAL DATA

The Goal Data area ❶ identifies the Provider that created the Goal, date the Goal was created, the Goal Classification and Type, a Target Date for Goal completion, the Overall Status of the Goal, and finally, the User-specific follow-up associated with the Goal. (Figure 47)

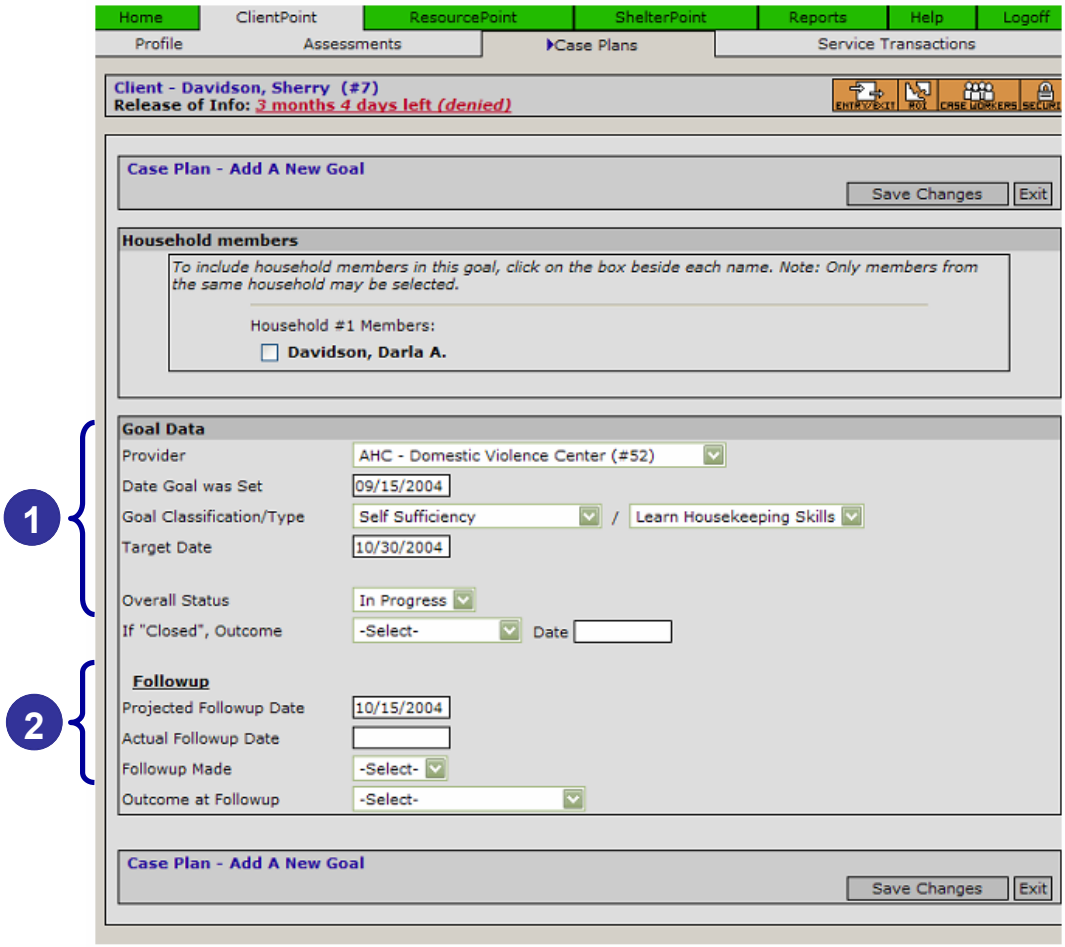

Figure 47: Case Plan Goal Data Screen

Goal *Classifications* are used to categorize Goals into related groups. Goal *Types* are the actual Goals associated with the Goal category. Each Goal can be tied to a Target Date, a date by which the Goal should be achieved. The overall status of the Goal (Closed, Identified and In

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Progress) should be updated throughout the Case Management process. If the status is 'Closed', it is important to enter the outcome, i.e. abandoned, achieved, Goal revised, or partially achieved, and date it was closed.

A "Followup" area ❷ is simply a "to-do list", or a reminder for Users to check on the Client's progress. This list is displayed on the User's Home Page. Once the "follow-up" is made, the User can remove the item from the Home Page by entering a date in the "Actual Followup Date" field. The User is then prompted to record the "outcome" at the time of the follow-up.

Once a new Goal has been saved, the page expands to display three additional areas: **Case Notes, Action Steps Planned** and **Service Items For This Goal**. (Figure 48)

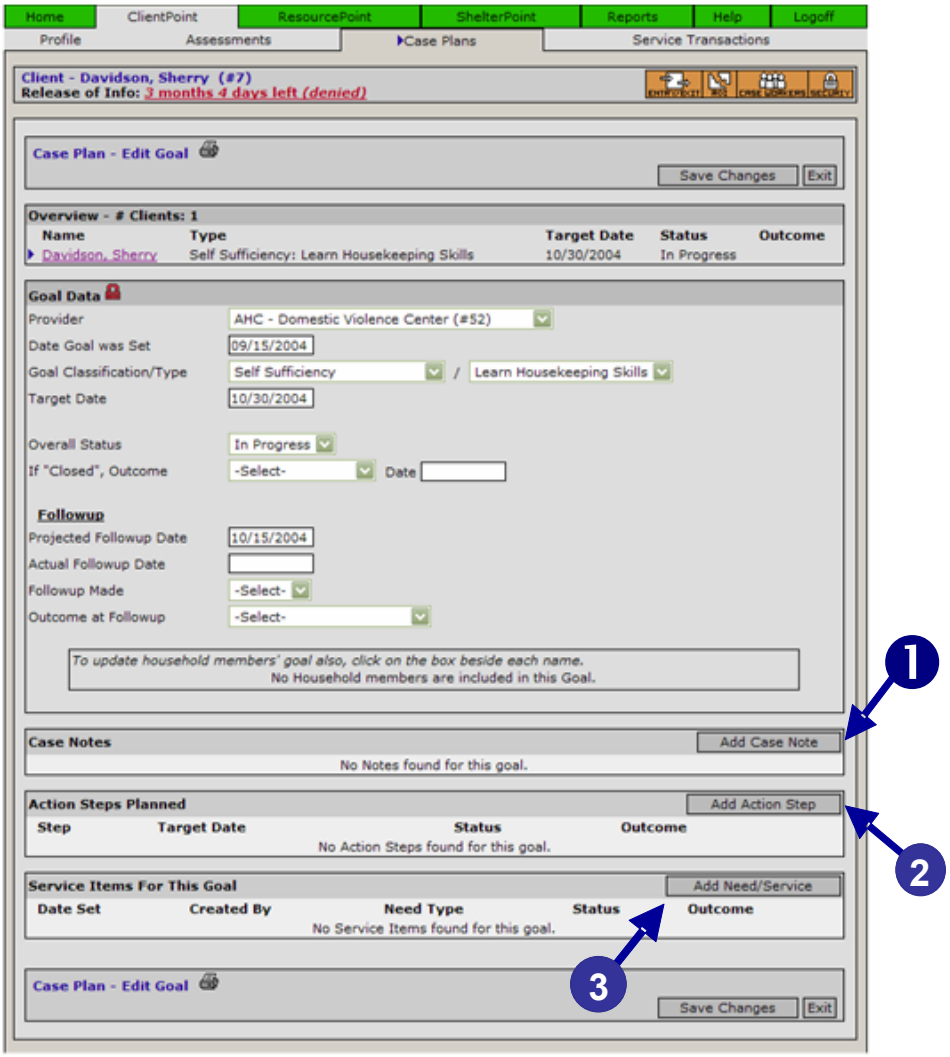

Figure 48: Saved Goal Data Page

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ADDING CASE NOTE

To create a Case Note, simply click the **Add Case Note** button ❶. In the Case Notes popup window (Figure 49), the User's default Provider and current date and time is displayed. If needed, this information can be changed. The ability to edit Case Notes may be deactivated at the system level, e.g. many health care providers cannot edit Case Notes for legal reasons. (See the Administration chapter for details on how to deactivate this feature.) For such installations, if an error was made in the note, the User will need to create another Case Note that explains the error.

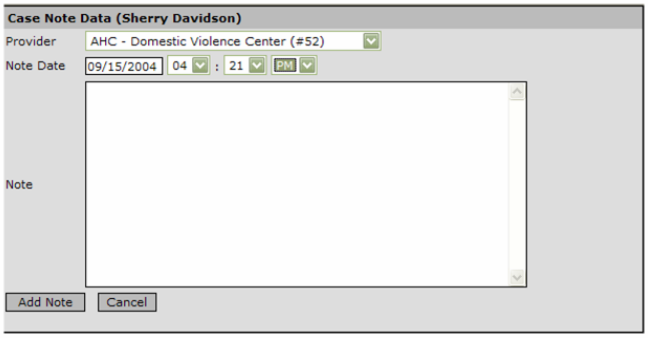

Figure 49: Case Note Data

ADDING ACTION STEPS

Action Steps are Client tasks and responsibilities that are designed to help the Client reach his/her Goal. Action Steps are a great way to track the Client's progress toward his/her Goal.

To add an Action Step, locate the **Action Steps Planned** section of the Case Plans screen and click on the **Add**

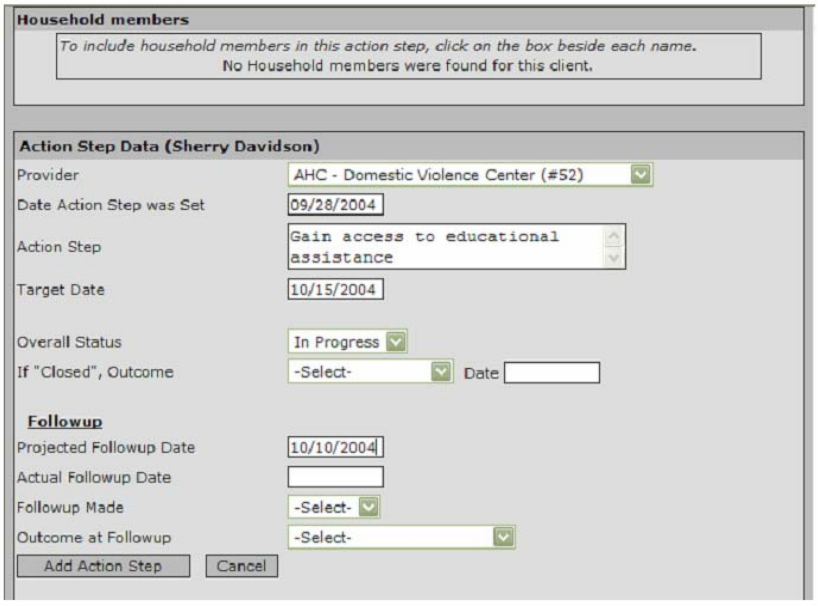

Figure 50: Add Action Step Screen

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Action Step button (Figure 48,❷). The Action Steps pop-up window will appear (Figure 50 above) The User's default Provider and a date field for the **Date the Action Step was Set**, and a text field where the Action Step to be taken can be typed are displayed. The window also provides fields for **Target Date, Overall Status**, and **If "Closed", Outcome**.

A Followup section has also been provided to allow the User to create a reminder for him/herself to see whether the Client has performed the identified **Action Step**.

After the Action Step Data screen has been completed, click the **Add Action Step** button. The popup window will close and the User will be returned to the previous screen. The Action Step will now appear in the **Action Steps Planned** section. If a Household Member had been selected when the Goal was first added, the Action Steps will be listed for each Household Members' record as well.

ASSOCIATING A SERVICE NEED WITH A GOAL

Sometimes Clients have Needs that require assistance in order to achieve a Goal. ServicePoint gives Users the ability to enter NEEDS and SERVICES related to a Goal. (Figure 48, ❸)

Upon clicking the **Add Needs/Services** button, the User is transferred to the *Service Transactions* screen where the NEED and SERVICE can be recorded. This is explained in Providing Services or Referrals Using Service Transactions section of this chapter. The process is the same with one exception. There is an additional line that signifies that the Need is associated with the Goal.

USING FOLLOWUPS

If a Follow-Up has been created, it will appear on the User's ServicePoint HomePage. The Followup List is a user-specific "to-do" list that reminds Users of their Clients' Services, Goals and Action Steps. (Figure 51 below)

Using the mouse, hover over the word "**Client**" ❶ within the Followup List to reveal the name of Client associated with the followup ❷. The word "**Client**" is a hyperlink that allows the User to access the Client's *Profile* screen. The **hyperlinks** ❸ in the "Type" column allow thee User to

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directly access the associated Client's Goal, Action Step or SERVICE. The Date and Time Remaining columns ❹ indicate the due date and the number of days remaining before the due date of the scheduled Followup. If the date has passed, the word *Past* appears in red in the Time Remaining column.

A Followup will remain on the Home Page until the User enters a date in the **Actual Followup Date** field within the respective Goal, Action Step or Need/Service Screen.

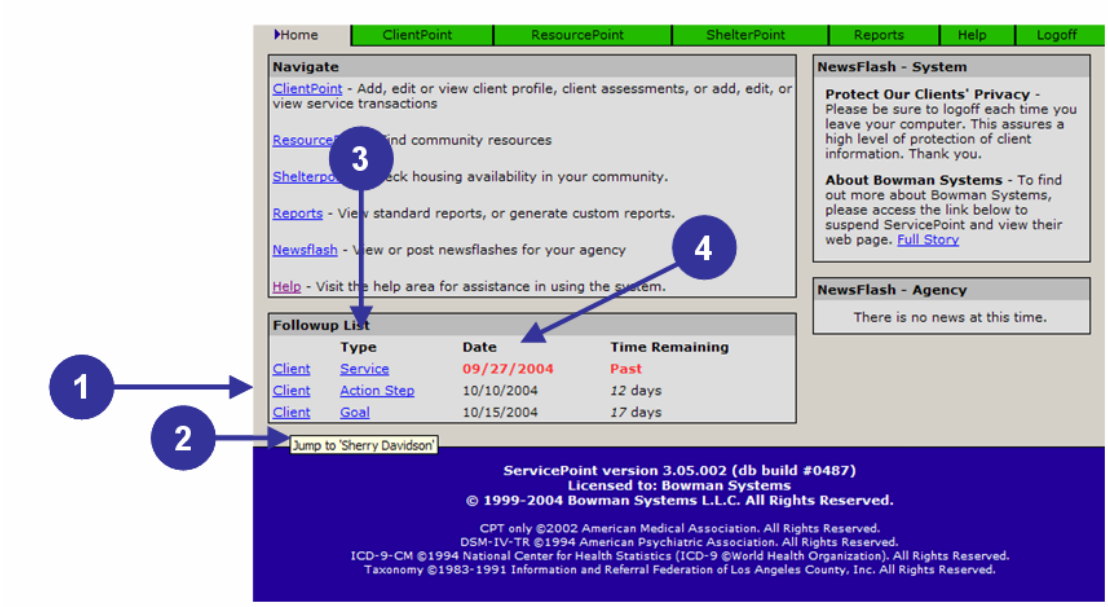

Figure 51: User Home Page with Follow-Ups

QUICK CALL INFORMATION

The **Quick Call Information** section (Figure 52 below) at the top of the ClientPoint Search screen is an excellent way to record 211 type calls or to track call activity.

The Quick Call feature is primarily used by Call Centers that are required to document the exact amount of time spent on each client call for reporting and funding purposes. It gives the User the ability to record each call time quickly and efficiently. Since the caller is effectively a participant in the program during the call, this feature generates a type of Entry. Everything a

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User can do in ClientPoint (i.e. answer Assessments, create Case Plans, record **NEEDS** and **SERVICES**, etc) can be done while using the Quick Call feature.

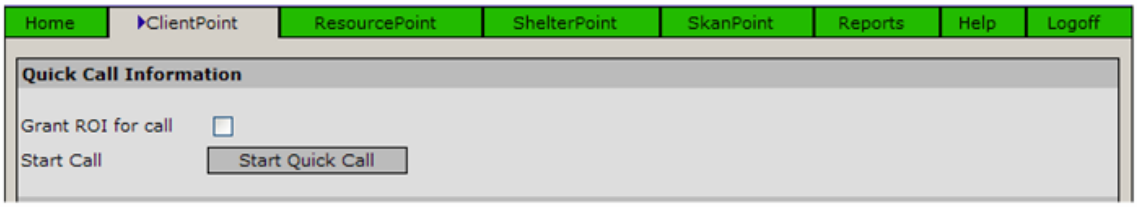

Figure 52: Quick Call Section of ClientPoint Search

Quick Call is accessed within the ClientPoint screen by selecting the **Start Quick Call** button (Figure 52 above). A popup window will appear asking the User to confirm that the User wants to use the Quick Call function (Figure 53).

Figure 53: Quick Call Confirmation Window

If the User clicks **OK** the Quick Call Information section of the screen changes (Figure 54 below). It will show the current date and time ❶, as well as the ROI status ❷. If the User clicks **Cancel,** the screen does not change.

If the **Grant ROI for call** checkbox had been selected prior to clicking the **Start Quick Call** button, ServicePoint will generate a one-day ROI for the current date (**expires today**). This will "trigger" the Provider's default security settings for all information collected during the Quick Call.

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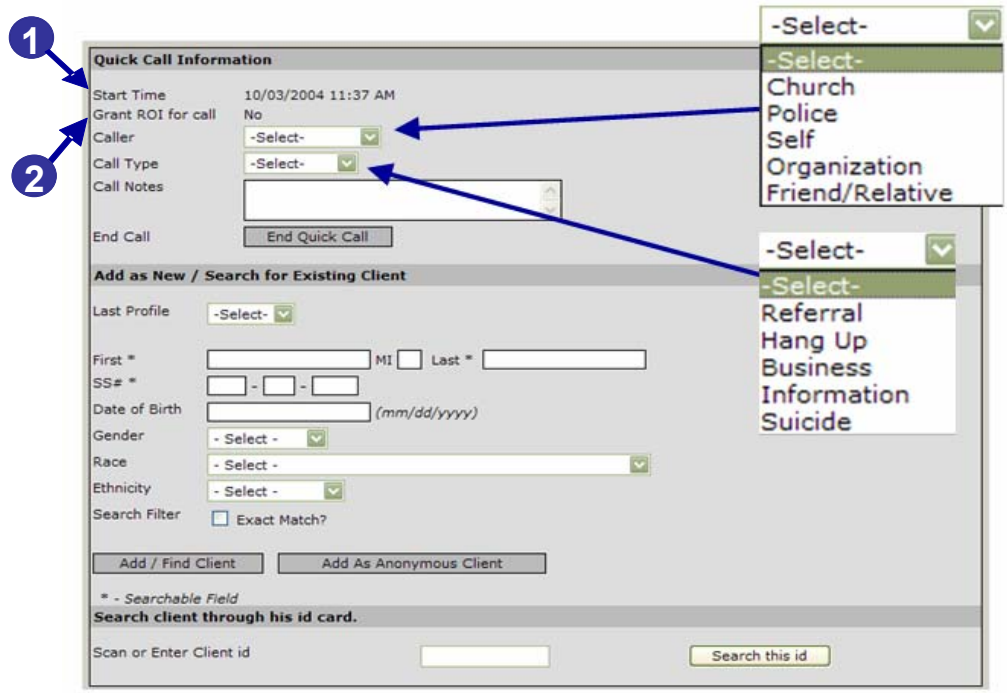

Figure 54: Quick Call Information Screen

If using the Quick Call feature, Users have the ability to define the Caller and the Call Type from dropdowns. These lists **are** customizable. (See the **PickList Data** section in the Administration chapter). Notes pertinent to the call can be entered in the Call notes section.

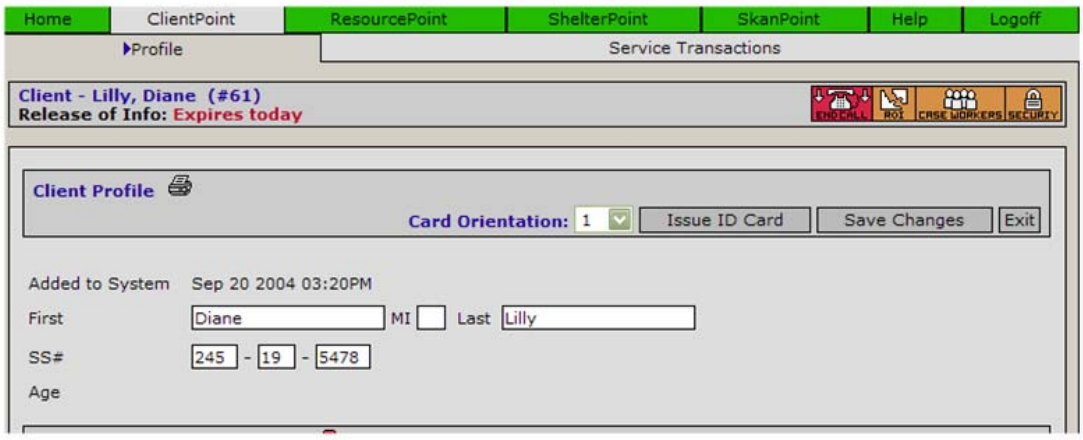

Figure 55: Client Profile using Quick Call

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When recording a Quick Call, the

icon (End Call) replaces the Entry/Exit icon located in the top right portion of the screen. This indicates that the Client is "enrolled" in the User's "program" during the duration of the call, since during the call the User is either collecting data on the Client or is providing a Service to the Client (even if that Service is simply a request for information.)

To end the call, select the End Call icon and verify the desire to end the call. The User is returned to the Quick Call Information screen. Selecting the End Quick Call button will end the call and display a blank ClientPoint Search Screen.

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IN SUMMARY …

- There are four pages, or "sub-modules," of ClientPoint: Profile, Assessments, Case Plans and Service Transactions.
- The ability to access these pages is dependent on a User's access level.
- Searching for existing Client records is designed to prevent the creation of duplicate records within a ServicePoint community.
- Entering the first and last name, date of birth and gender are critical to the proper creation of a Client record and associated unique Client ID.
- The Client Profile is used to record Client static and demographic information.
- Assessments are topic-specific questionnaires used to record information related to a Client.
- Case Plans permit the recording of identified Goals and their associated Case Notes, Action Steps, Service Transactions provided to help achieve the Goal.
- Service Transactions records identify Client NEEDS, as well as the SERVICES provided and REFERRALS issued to help meet those NEEDS.
- Follow-ups are User-specific reminders employed to help track the progress of Client Goals, Action Steps, NEEDS, and SERVICES.
- ROIs record whether a Client has given his/her permission to share his/her information within a ServicePoint community.
- The ServicePoint functionality behind the ROI is to trigger the Provider's default sharing agreements within a ServicePoint community.
- The security status of Client-specific data has four possible states: Open, Open with Exceptions, Closed and Closed with Exceptions.
- Recording the Entry and Exit of Clients to and from programs is vital to accurate HUD reporting.
- SERVICES are provided to meet a Client's NEEDS. REFERRALS are assignments to other Providers to address a Client NEED.

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- Linking Household Members reduces data entry by recording information for multiple Clients at one time.

- Backdate Mode is used to enter information "after the fact" while accurately recording the date the information was collected.

- Client photos can be stored for each Client in the File Attachment section of a Client's record and is used to create Client Photo IDs if the User has permission to use the SkanPoint module.

- Infractions or bans can only be recorded by access levels of Agency Administrators and above and are simply points of information. Infractions do not prevent any function of ServicePoint from working.

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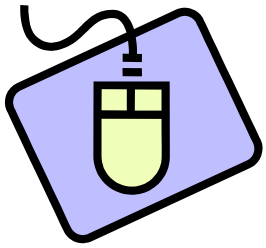
CHALLENGE STEP …



1) Add a new Client record
2) Create a Household
   a) Add two additional Household Member
3) Give the entire Household a ROI
4) Give the entire Household a HUD Entry
   a) Answer 4 HUD questions (on the Entry screen)
      i) Repeat this for each Household Member
5) Add a Goal for the entire Household
   a) Add a Followup
6) Add a Needs
   a) Look at the other Household Members' records to verify that the needs have been applied to all Household Members.
7) Add two Referrals
8) Cancel one Referral
9) Add a Service
10) Add an Exit
   a) Change those 4 HUD questions (on the Exit screen)
   b) Repeat this for each Household Member

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CHAPTER 5: SHELTERPOINT

CHAPTER OBJECTIVES

- Discuss the capabilities associated with the use of ShelterPoint.
- Describe how to view, create and cancel bed reservations.
- Illustrate how to add and remove Clients from a bedlist.

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INTRODUCTION

Organizations that provide shelter to individuals and families in times of need can use ShelterPoint to document, manage and report Shelter activities. Bedlists are created by Administrators for Providers indicated as Shelters on the *Admin Provider Profile* screen. *For instructions on this configuration, please see the Admin Providers section of this course.*

ShelterPoint gives you the ability to:

- View bed availability
- View and fill empty beds
- Create reservations
- Track and manage bed overflow
- Track locker assignments
- Document distributed supplies
- Mark beds as "held" (new in 3.06)
- Check-Out Beds (Individually or by Group)
- Take note of previous Infractions

CHECK-IN

Using ShelterPoint to check a Client into a shelter can be done two different ways: 1) by converting a Client Reservation or 2) by directly checking a Client into an empty bed. Whichever method is used, the Provider must first:

- be configured as a ServicePoint user
- be configured as a Shelter in the *Provider Profile* screen
- have a bedlist

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The first step in using ShelterPoint is to select the Provider who's Bedlist the User wishes to access. (Figure 56)

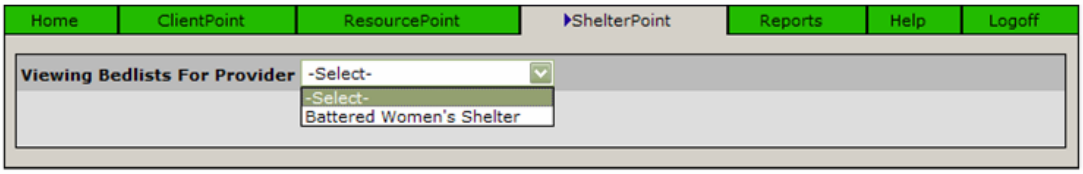

Figure 56: ShelterPoint Screen

Once the Provider is selected, the main screen expands to show additional Shelter information. (Figure 57)

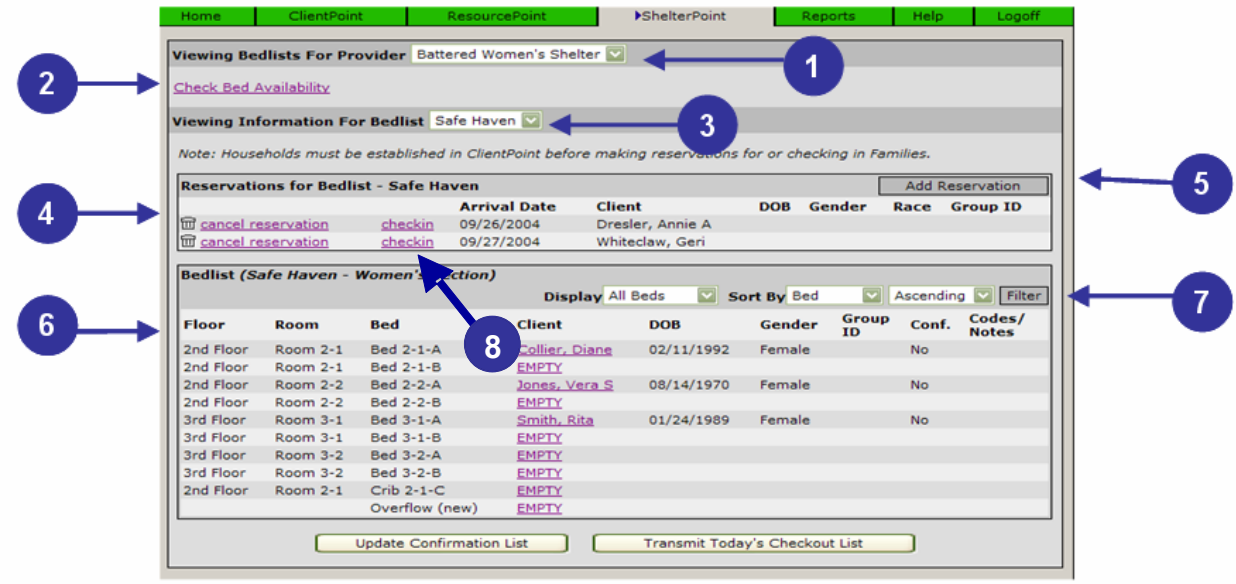

Figure 57: ShelterPoint Main Page

❶ **View Bedlist for Provider**: This is a dropdown list of all Providers for which the User can enter data that have been configured as Shelters. The choices available are determined by the User's access level and his/her default Provider.

❶ **Check Bed Availability:** Used to view a list of available beds for Shelters within the User's ServicePoint community.

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❸ **Viewing Information for Bedlist:** A list of the Bedlists for the chosen Provider.

❹ **Reservations for Bedlist Section:** Allows Shelter personnel to delete or cancel existing bed Reservations, or to convert a Reservation into a "Check-in."

❺ **Add Reservation:** Permits Shelter personnel to add a Reservation for a Client.

❻ **Bedlist:** Shows bed status within a bedlist.

❼ **Filter:** Permits the User to choose which beds to display, i.e. all beds, all full beds, or all empty beds. The User can also determine the manner in which the information will be sorted.

❼ **Check-In Hyperlink**: Allows the User to convert the reservation into a check-in.

CREATING BED RESERVATION

A bed Reservation is a request for placement into a bed, but a Reservation does not constitute a confirmation or guarantee of the request. To create a Reservation, click on the **Add Reservation** button (Figure 57, ❺ above). A popup window will appear prompting the User to either search the database for an existing Client or create a new Client, similar to finding or adding a Client in ClientPoint. (Figure 58 below)

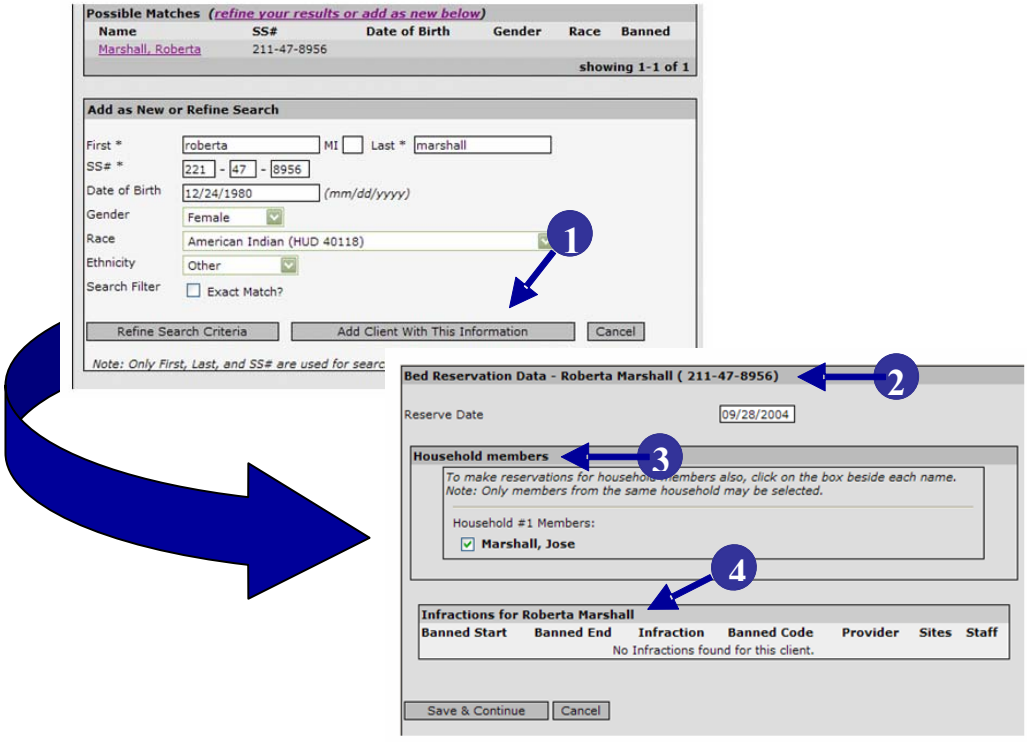

Figure 58: Client Search and Reservation Screen in

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If there is not a match with the search criteria entered, the User can click the **Add Client With This Information** button ❶ to create a new Client record. ShelterPoint will then continue with the bed Reservation.

The name and social security number of the Client for whom the Reservation is being made is at the top of the Bed Reservation Data popup window ❷. Household Members can be included with a bed Reservation ❸. Infractions entered for that Client are also included for viewing and consideration ❹. Please note that infractions are nothing more than points of information. The presence of an infraction does not prevent a User from continuing with a Reservation or Check-in.

Upon clicking the Save and Continue button, the ShelterPoint Main screen will be refreshed, displaying the new Reservation in the **Reservation for Bedlist** section of the page (Figure 59, ❶)

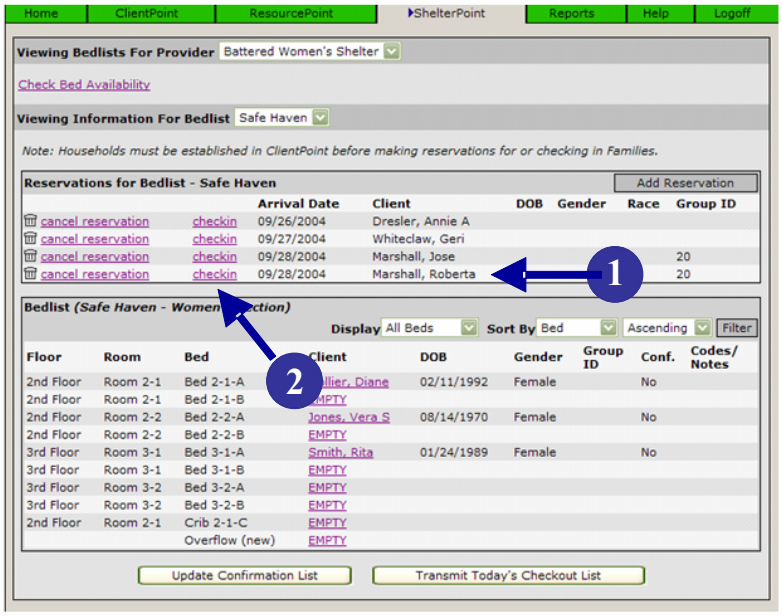

Figure 59: ShelterPoint with Added Reservations

CHECK-IN CLIENT FROM A BEDLIST RESERVATION

Clients who have arrived at the shelter that have a Reservation can be checked in very easily. From the Reservation from Bedlist section ❷, the User should click the **check-in** hyperlink next to the Client's name.

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The Reservation Checkin: Bed Stay Data popup window will display (Figure 60).

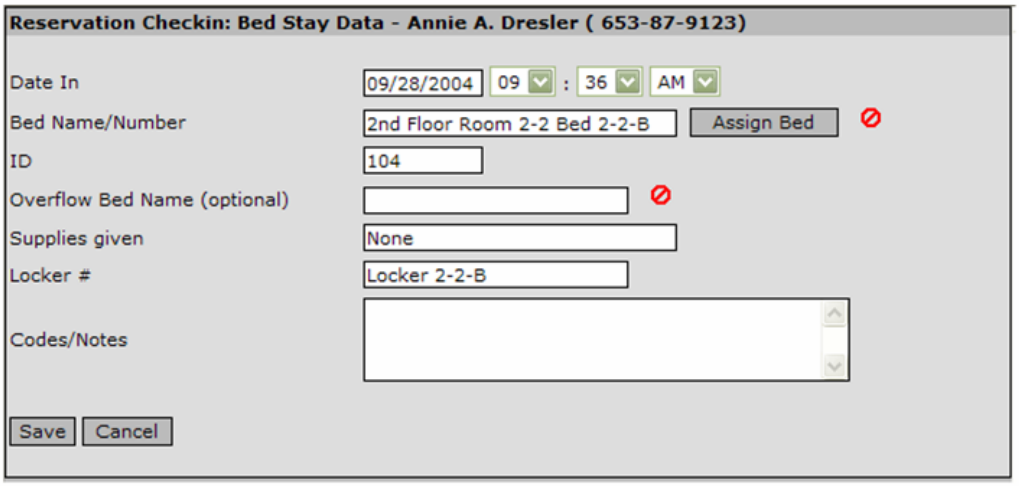

Figure 60: Reservation Checkin Bed Stay Data Popup Window

The **Date In** will display the current system date and time the Client was checked into the shelter. The date and time can be modified if the User did not enter the Client in "real time." The Assign Bed button is used to display a popup list of available beds for that Shelter and will fill in the selected bed assignment and its associated ID number in the **Bed Name/Number** field. The icon is used to clear an associated field.

It is not uncommon for some Shelters to utilize old army cots, sleeping bags, etc to keep from having to turn a Client away, particularly during inclement weather. In those situations, the **Overflow Bed Name** (optional) field is used for those Clients that were not given an actual bed, but who were not turned away by the Shelter. Since the overall objective is to count "heads" not beds, overflow beds are not automatically given a "name" by ServicePoint. However, the User can define a name for each Overflow bed if necessary.

Supplies given to Clients in connection with their check-in can be noted in the **Supplies Given** field. In addition, locker assignments can be recorded using the **Locker #** field. Any other pertinent information related to this check-in can be noted in the **Code/Notes** text field.

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After the User completes the data fields and clicks the **Save** button, the **Reservation Checkin Bed Stay Data p**opup window closes and the system returns to the ShelterPoint screen. The Client now appears in the Bedlist section with an assigned bed (Figure 61, ❶).

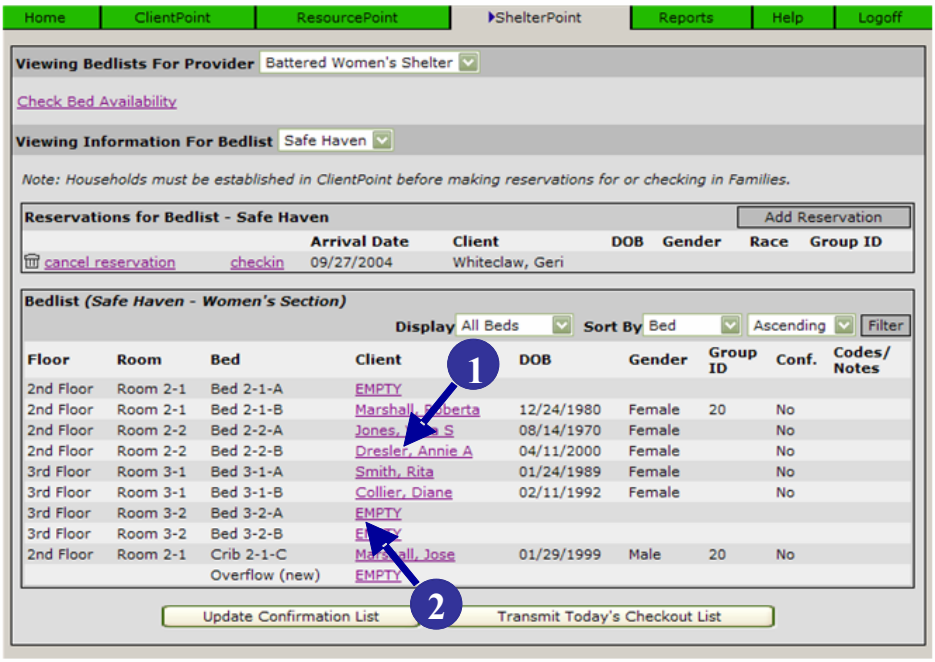

Figure 61: Results of Converting Bed Reservation to Check-In

DIRECT CHECK-IN USING EMPTY LINK

"Direct check-in" permits the placement of Clients into a bed without using the Reservation feature of ServicePoint. To use "direct check-in", click on the **Empty** hyperlink (Figure 61, ❷) located to the right of a named bed in the Bedlist section of the screen. If there are no beds available, the User can click the **Empty** hyperlink in the **Overflow** (new) line to record an Overflow entry. The *Check In Client* popup window appears.

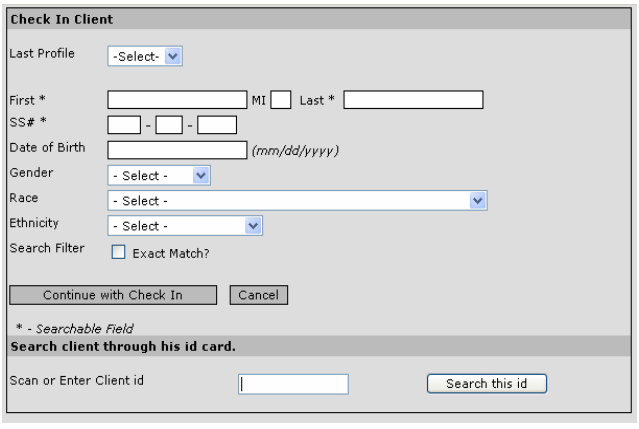

Figure 62: Check In Client Search Screen

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As is the case when adding a Reservation, adding a Client directly into a bed requires the User to either search for an existing record or add a new record into the system (Figure 62). If the Client is already in the system, select the Client name and click **Continue with Check In**.

If there is not a match, the User can click the **Add Client With This Information** button and create a new Client record. In either case, the check-in process will then proceed when the **Continue with Check-In** button is selected.

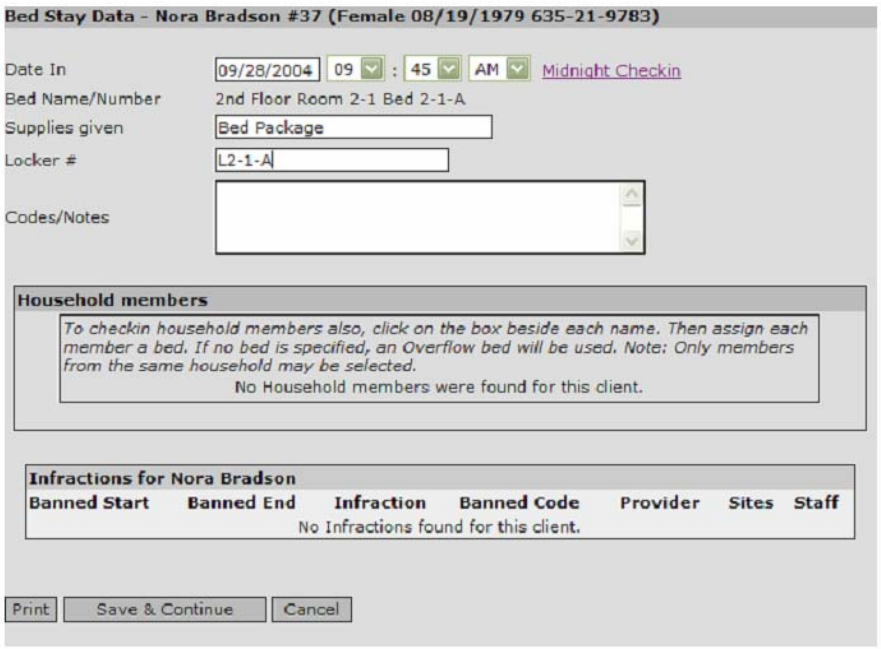

Figure 63: Bed Stay Data Popup Window

The *Bed Stay Data* popup window (Figure 63) will display showing the Client name, ID number, gender, date of birth and social security number at the top of the window. This window is similar to the *Reservation Check-In: Bed Stay Data* window with the exception of the **Midnight Checkin** hyperlink. This feature is used by Shelters who check Clients in after midnight. It sets the check-in time to 11:59 pm on the date before the current date to indicate which night the Client actually stayed in the Shelter. For example, if a Client checks-in at 3:30 am on 12/24/2003, he/she is actually in the Shelter the night of 12/23/2003. The **Midnight Checkin** feature resets the time and date from 3:30 am 12/24/2003 to 11:59 pm 12/23/2003. Now, the proper night is recorded in the system for accurate reporting.

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CANCELING A RESERVATION

If a Client fails to arrive at the Shelter for which he/she has a Reservation, or upon arriving it is determined that the Client cannot check-in to the Shelter for any reason, the User should **cancel reservation**. Canceling the reservation will maintain a historical record of the Reservation and the reason for its cancellation. Deleting a Reservation does not store this historical information and should only be done if the Reservation was entered incorrectly or by mistake.

Upon selecting the **cancel reservation** hyperlink, the *Reservation Cancellation* popup window opens (Figure 64). From the **Reason need was not met** dropdown list, the User should select the appropriate reason for the cancellation. After clicking the **Save** button to record the cancellation, the reservation is removed from the *Shelter's Reservation for Bedlist* section.

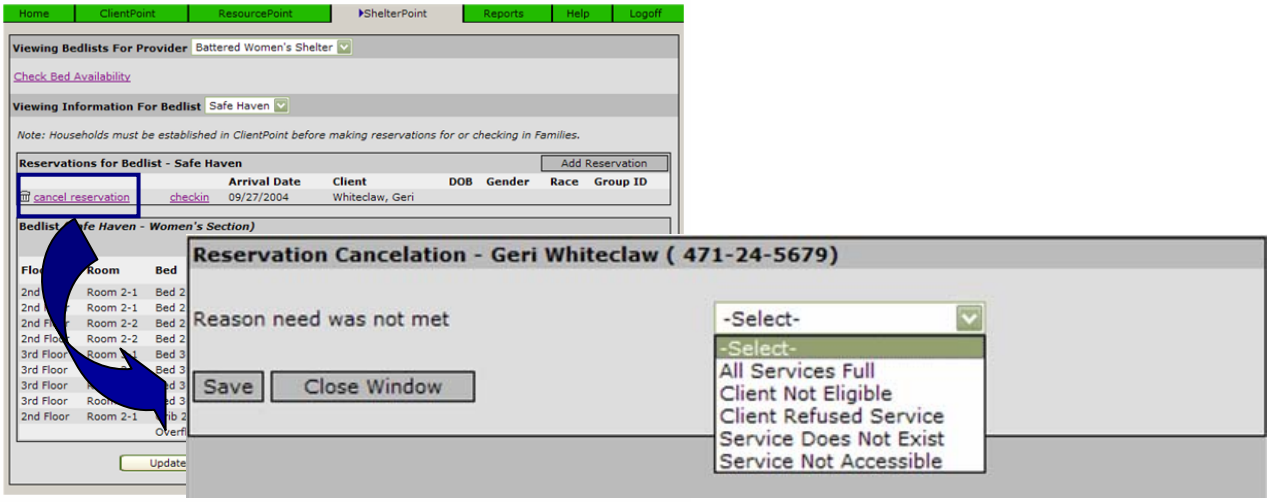

Figure 64: Reservation Cancellation Popup Window

CHECK-OUT

There are two ways to check out Clients: 1) check out each Client individually, or 2) check-out multiple Clients at one time using the **Transmit Today's Checkout List** button located at the bottom of the ShelterPoint screen.

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INDIVIDUAL CHECK-OUT

To check out an individual, click on the desired Client's name in the **Bedlist** section of the ShelterPoint screen. At the bottom of the *Bed Stay Data* popup window (Figure 65 below), the checkout date and time should be entered by the User. They can also indicate if the supplies given were returned and whether there was a cost associated with the service. Costs can be broken down into two funding sources.

The top half of the *Bed Stay Data* popup window allows the User to edit the date and time of check-in, indicate if the client has a confirmation for the next night's stay, reassign a bed, if necessary, and edit supplies given, locker assigned, and any codes or notes associated with the Client.

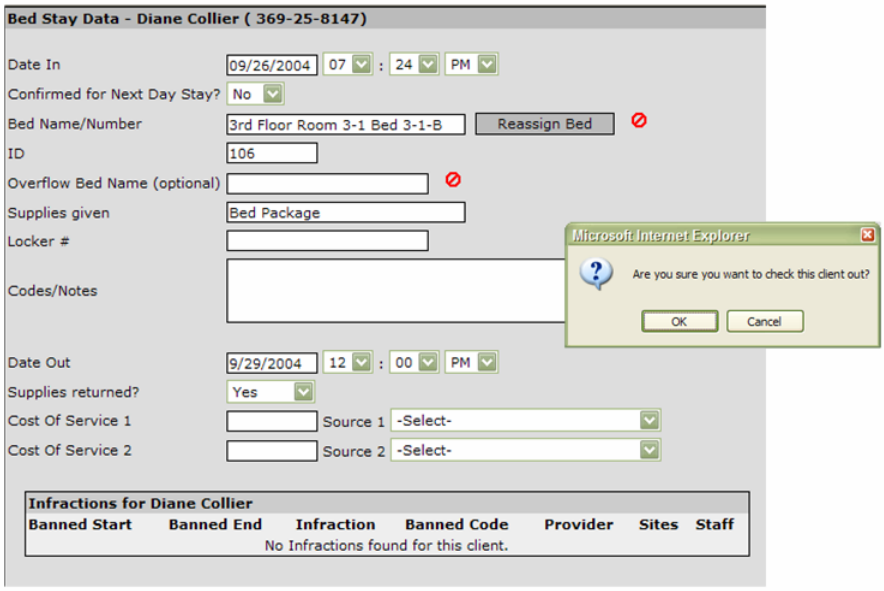

Figure 65: Bed Stay Data with Confirmation Popup Box

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BULK CHECK-OUT

When the **Transmit Today's Checkout List** is pressed, the *Check Out Screen* popup window displays a list of Clients that are checked into the current bedlist (Figure 66). Each Client in the list has a checkout box located to the left of his/her name. When the User clicks on one of these *Checkout* boxes a check mark will appear, designating the associated Client as one who will be checked out of the Shelter.

If the checkout date and time for all Clients is the same, fill out the **Checkout Date** field located at the very top of the window and click the **Set Dates** button.

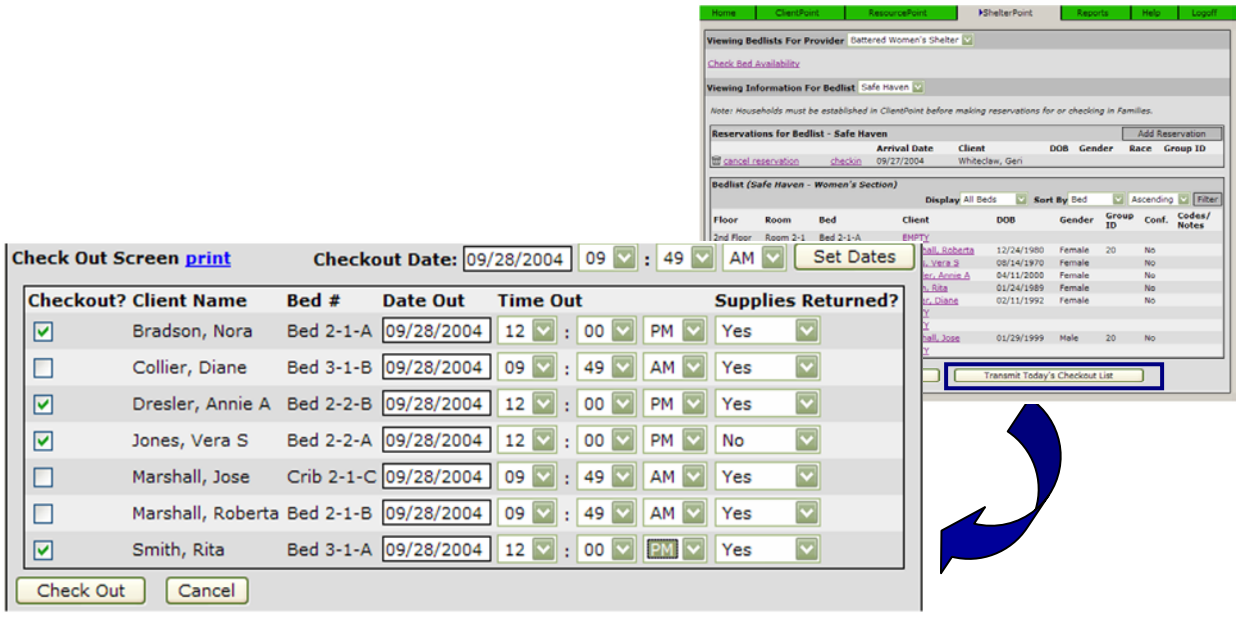

Figure 66: Check Out Screen Popup Window for Bulk Check-out

This date and time will be set for all designated Clients in the list. If the check-out dates and time are different for each Client, then complete each Client record individually with the appropriate information.

Once all information for each Client is complete, click the **Check Out** button. The ShelterPoint screen will refresh with the checked-out Clients removed and the beds they occupied showing as empty (Figure 67 below).

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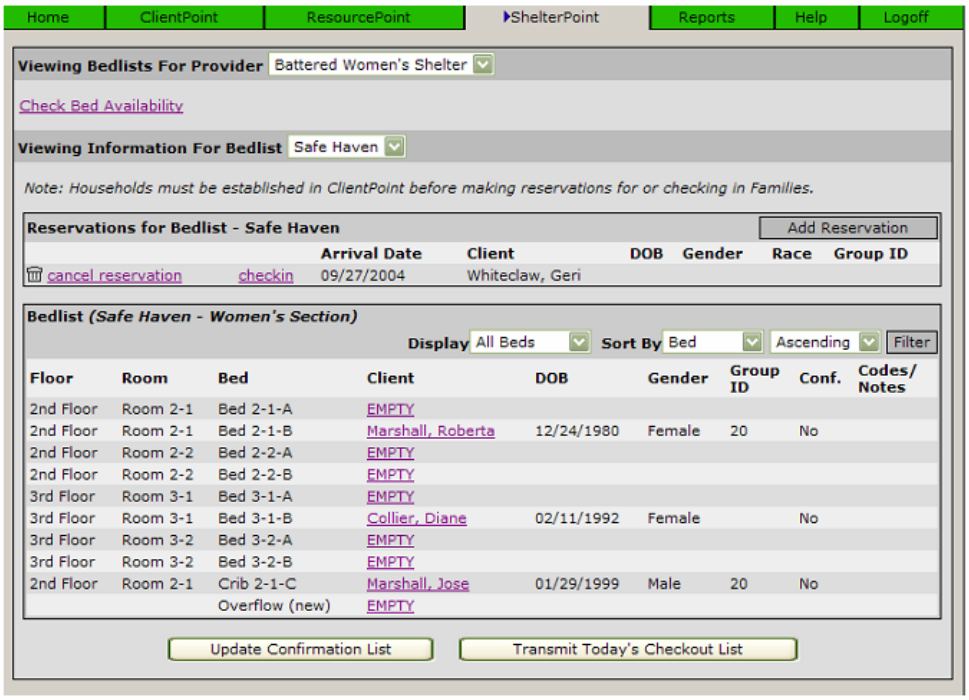

Figure 67: Refreshed ShelterPoint Main Page After Bulk Check-Out

NEXT DAY CONFIRMATIONS

Confirmations are created for Clients that the User does not want to include in the **Transmit Today's Checkout List**. Confirmations can be created one Client at a time while on the *Bed Stay Data* popup window (Figure 65 above) or for multiple Clients at once by using the **Update Confirmation List** feature (Figure 68).

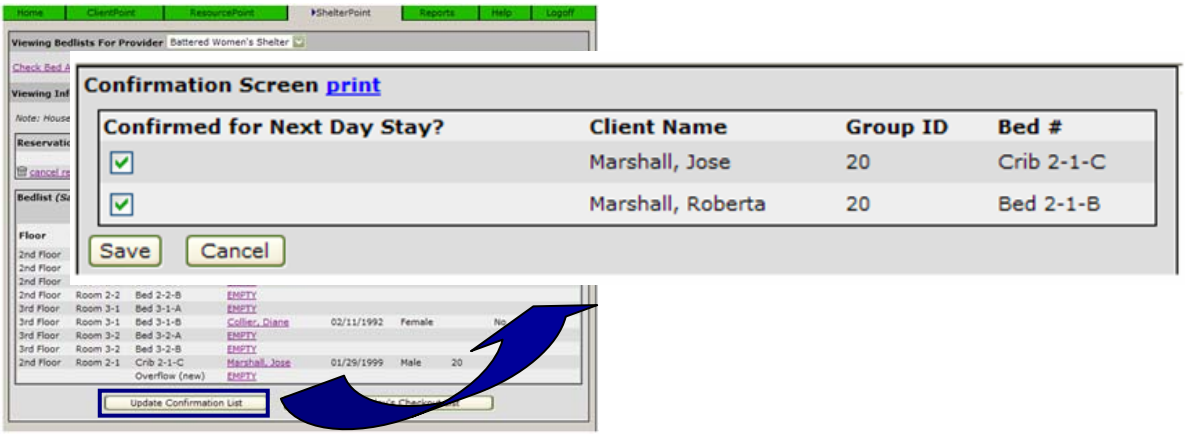

Figure 68: Confirmation Screen Popup Window with Confirmed Clients

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Selecting the **Update Confirmation List** button, located at the bottom left of the ShelterPoint screen, will open the *Confirmation Screen* popup window. This window displays all Clients currently checked into the bedlist. Placing a checkmark next to a Client's name will indicate that the Client has been confirmed for the "Next Day Stay" and will not be included in the **Transmit Today's Checkout List**.

Clicking the **Save** button will return the User to a refreshed ShelterPoint screen. The **Conf**. column of the bedlist will now display a "Yes" for those Clients who have been have confirmed beds for the next night.

A Client will remain in a bed unless and until he/she is checked-out either individually or with other Clients. It is not necessary to confirm that Client is staying another night. The Confirmation List is simply a way to narrow the list of Clients in the Transmit Today's Checkout List.

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IN SUMMARY …

- ShelterPoint is a tool used by Shelter personnel to view and manage which Clients stayed in which beds and on what nights.
- Clients can be checked in by making a Reservation or by "direct check-in" into an empty bed.
- Providers must be configured as ServicePoint users, indicated as a Shelter, and have a Bedlist available in order to be accessed through ShelterPoint.
- Reservations can be converted into Client check-ins.
- Check-ins/outs and next day confirmations can be performed for a single Client or for a group of Clients.

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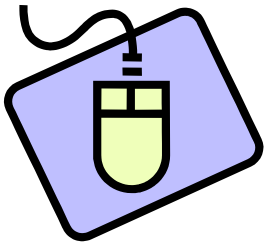

CHALLENGE STEPS …

1) Create a Reservation for an existing Client
2) Check that Client into a Bed
3) Check that Client out of a Bed as of 10/20/2004
4) Check in a Household directly (through the "Empty" feature)
5) Put one Client in an Overflow Bed
6) Confirm a "next night's stay" for one Household Member
7) Check Out the rest of the Household through the "Checkout List" feature

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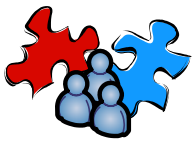
CHAPTER 6: SKANPOINT



CHAPTER OBJECTIVES

- Describe the capabilities of SkanPoint.
- Discuss screen differences encountered by Users configured to use SkanPoint.
- Describe the purpose of a Client list.
- List steps in the creation of Client ID card for individuals or a group.
- Describe how Services can be provided to multiple Clients using SkanPoint.

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INTRODUCTION

SkanPoint is designed to record one Service for several Clients at one time. This module also allows Users to create Client ID cards and access Client records through the static ID number. It is a flexible tool that must be activated both at the system and user levels. Administrators must configure each User to have access to the SkanPoint Module (see the Administration chapter).

Users who have been configured to use SkanPoint will have access to the following (Figure 69):

❶ The Navigation Bar will now include a tab for the SkanPoint module.

❷ ClientPoint's *Client search* screen will include the ability to search a Client by his/her ID number.

❸ The Client Profile screen will include an option to create a Client ID Card (**Issue ID Card**).

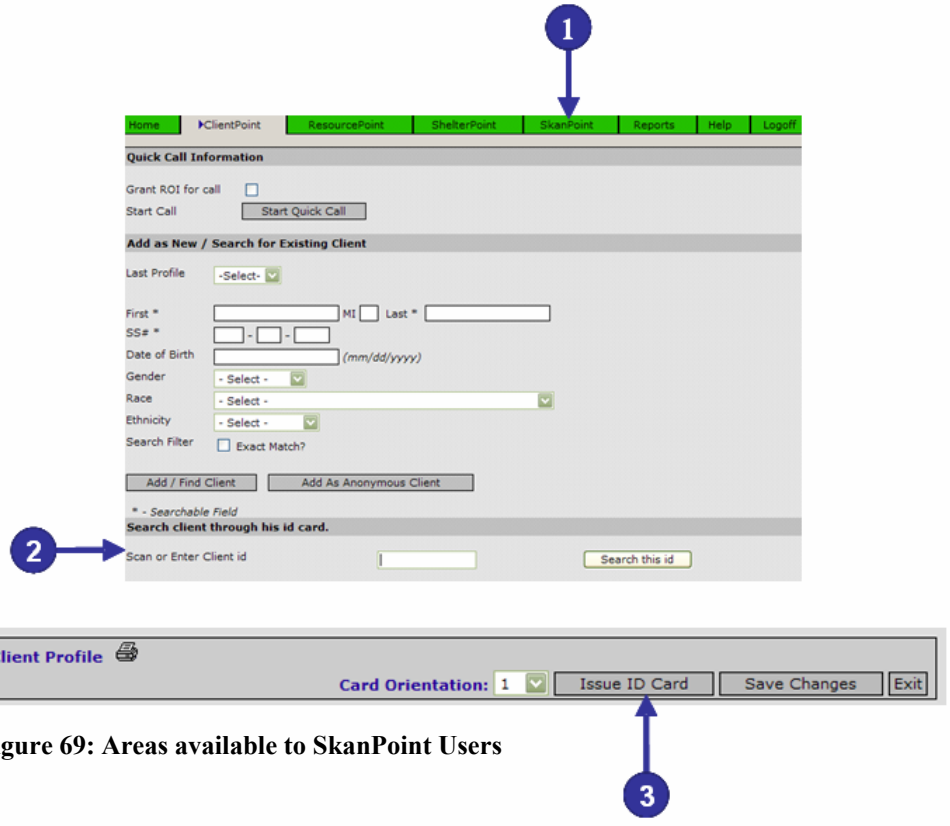

Figure 69: Areas available to SkanPoint Users

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Using the Client ID is a quick and precise method for accessing a Client record. The User has the choice of either scanning a Client ID Card or manually entering a Client ID number. If you manually enter the ID number, either click the **Search this id** button or press the **Enter** key. If the Client record exists, the User will be taken directly to the *Client Profile* screen for that Client.

The initial SkanPoint screen is divided into three sections (Figure 70):

1. **Choose Need Service** – used to define Provider, SERVICE, SERVICE Start and End dates, cost and funding source, and the Clients receiving the chosen SERVICE.
2. **Manage Clients in Client List** – used to create, edit and delete Client Lists.
3. **Generate Bulk ID Card** – used to create multiple Client ID cards at the same time.

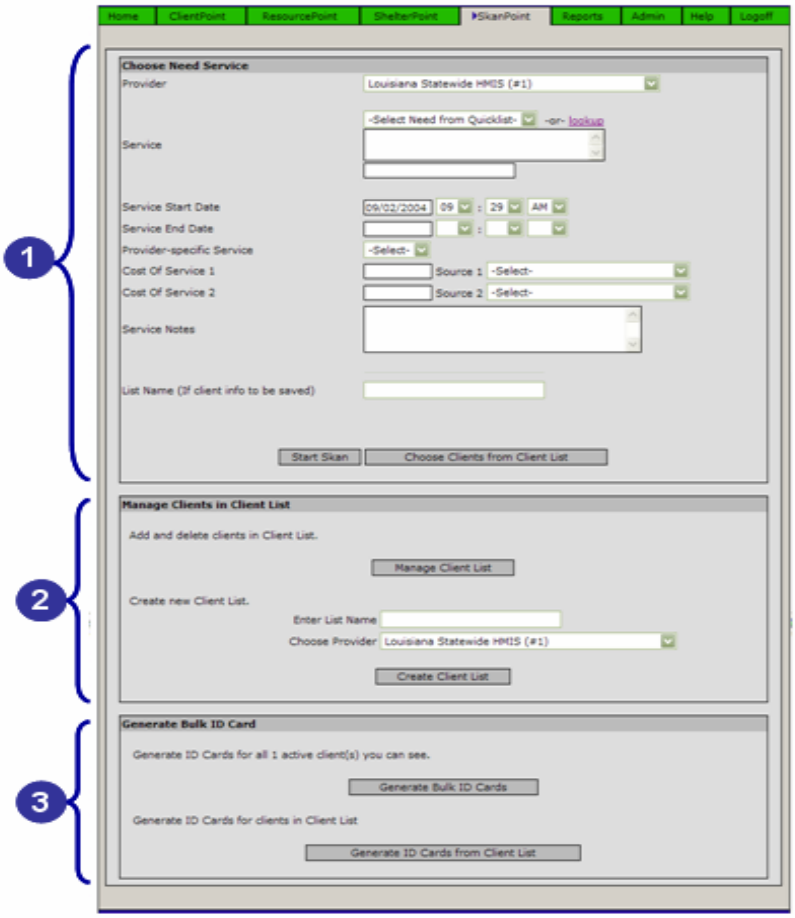

Figure 70: SkanPoint Main Page

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PROVIDING SERVICES TO MULTIPLE CLIENTS

Rather than recording Client SERVICES to each Client individually, SkanPoint provides the capability of recording the same SERVICE to multiple Client records at the same time. With the exception of the Lists, the information requested on the Choose Need Service screen is the same information that is requested on the *Service Transaction* screen in ClientPoint. (Figure 71)

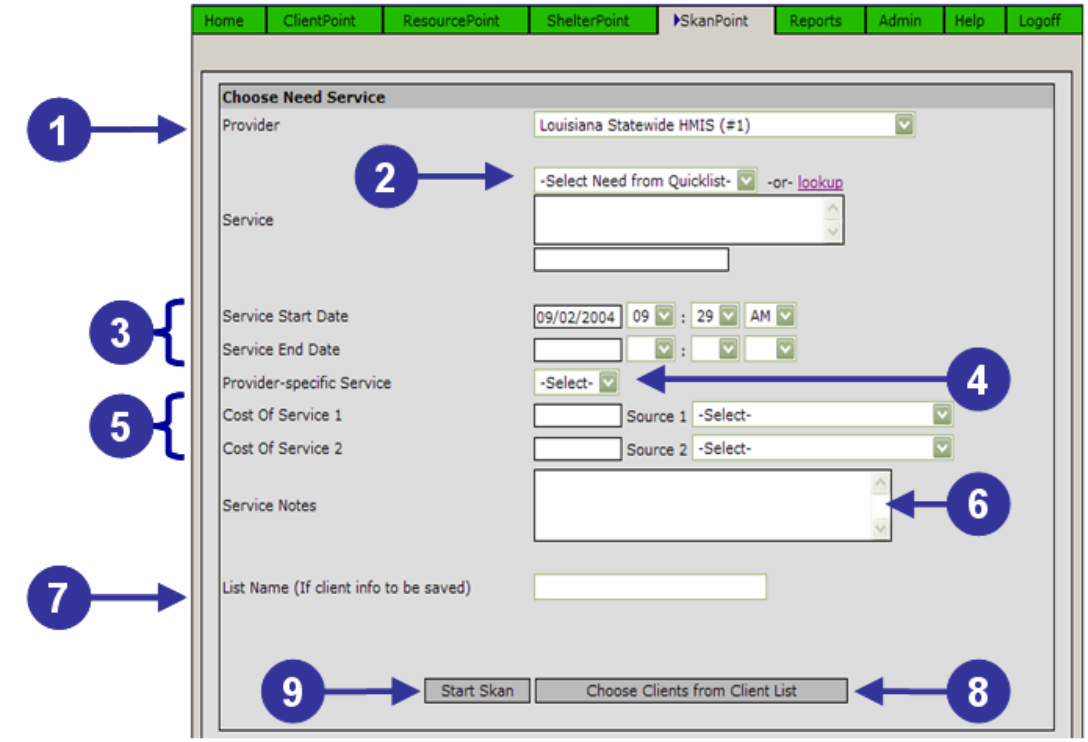

Figure 71: SkanPoint Choose Need Service Page

To record a SERVICE, the following information should be entered:

❶ The Provider that is supplying the Service.

❷ The Service being provided (using Code Set terms).

❸ The start and end date of the Service.

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If applicable:

❹ The Provider-specific Service for this Provider (if applicable).

❺ The cost and funding source of the Service (if applicable) .

❻ Notes that pertain to the Service provided (if applicable).

❼ A Name for the List of the Clients who received the Service, if the List is to be used again.

*If the User plans to provide more than one Service to a group of Clients, he/she should create a List. One way to do this is by naming the List on the List Name (if Client info to be Saved) line (*Figure 71,❼ *above). Another way to create a List is described below in the section called "Creating and Managing Client Lists."*

After the data has been entered, click **Start Skan** button to begin recording the SERVICE. The *Skan Client Bar Code* popup window opens to allow the User to record the SERVICE for multiple Clients. (Figure 72)

As soon as a Client ID is scanned or entered in this popup window, the SERVICE will be recorded. Users can remove the last scanned ID if necessary.

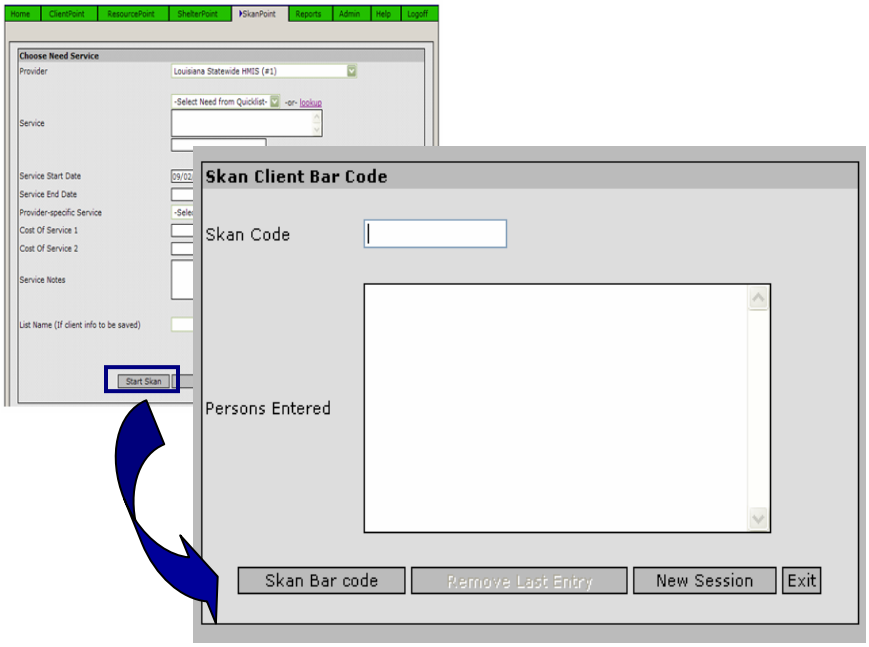

Figure 72: Skan Client Bar Code popup window

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The Clients receiving this SERVICE are stored in the *Persons Entered* section of this popup window. If the User has named the List, these Clients can be accessed as a group in the future, either by clicking on the **Choose Clients from List** button or through the *Manage Clients in Client List* section of the SkanPoint screen.

If the User chooses to record additional Services using a List, he/she must identify the Service to be provided, as described above. Then, rather than choosing to name a new List or start scanning without creating a list, the User should click on the **Choose Clients from List** button. This opens a popup window that displays all existing Lists. Once the User selects the desired List, the popup closes and the SkanPoint screen refreshes to display all the Clients that belong to the chosen List. All Clients that have a checkmark in the Check Box column will have the identified Service recorded in his/her record in the Service Transactions section. (Figure 73)

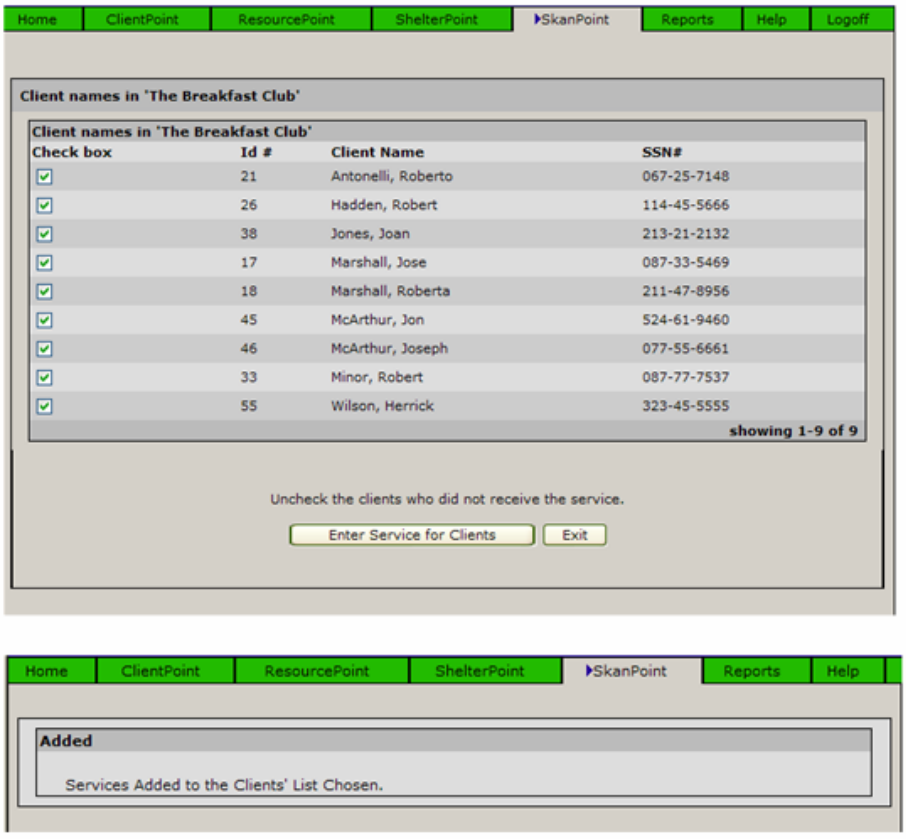

Figure 73: Recording Services Using Client List

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CREATING AND MANAGING CLIENT LISTS

Client Lists are used to record SERVICES for multiple Clients rather than creating a SERVICE Transaction for each Client individually. A Client List is typically created to group Clients who regularly receive the same SERVICES at the same time (such as congregate meals).

The *Manage Clients in Client List* section allows User to create and edit **Client Lists**.

Figure 74: Manage Clients in Client List Section of SkanPoint

An existing Client List can be accessed and edited by clicking on the **Manage Client List** button (Figure 71 above). A popup window opens to display all existing Lists. Once the User selects the desired List, the popup closes and the SkanPoint screen refreshes to display all the Clients that belong to the chosen List. (Figure 75)

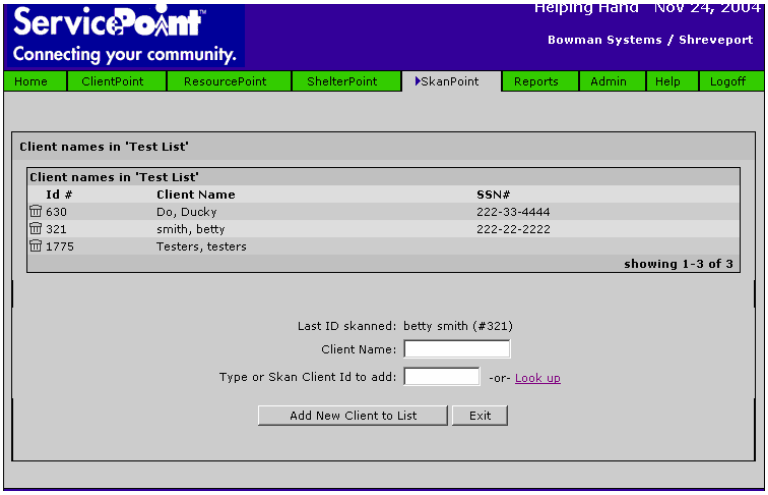

Figure 75: Client Names in List

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To add Clients to this List, either scan a Client ID Card or enter a static ID number. If the Client does not have an ID Card or if the Client's static ID number is unknown, click on the **lookup** hyperlink to display a popup window that allows the User to search for a Client Record by First Name, Last Name, Client ID, and Social Security Number. Clicking the **Add New Client to List** will add the Client to the Client names section of the screen. (Figure 76)

To remove a Client from a List, click the Delete icon next to the Client's name. This will NOT delete the Client record. It simply removes the selected Client from the List.

Once all the Clients for the list have been either added to or removed from the List, click Exit button to save changes.

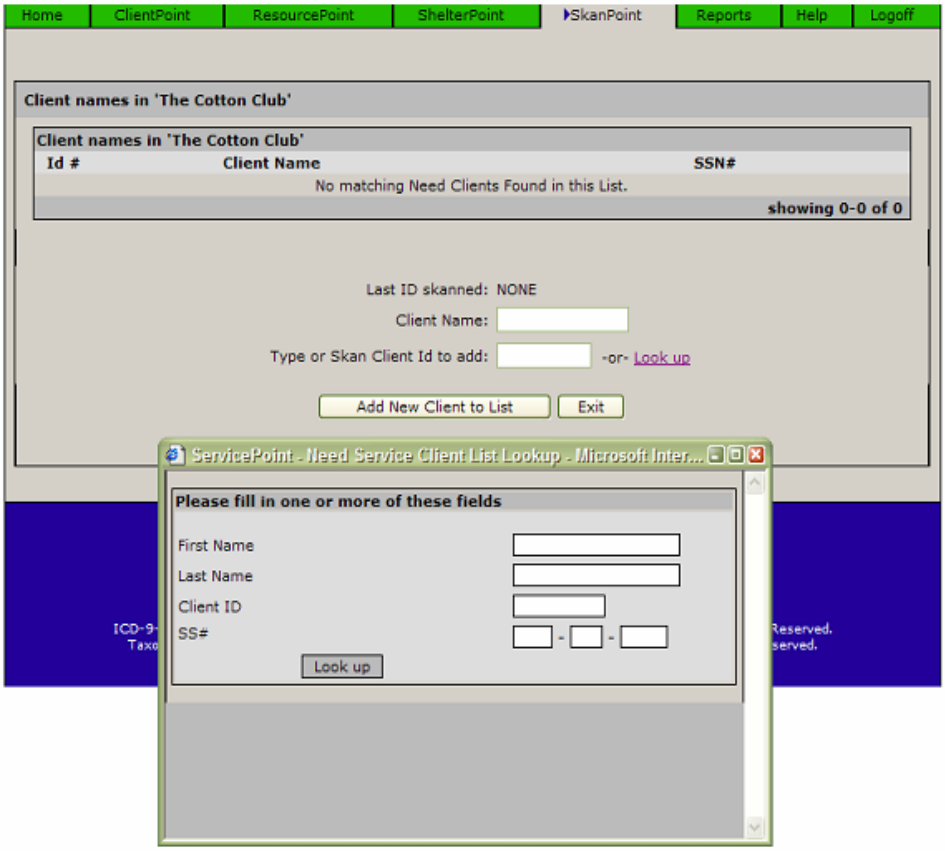

Figure 76: SkanPoint Page for Adding Clients to a List

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CREATING CLIENT ID CARDS

Client ID Cards provide Users a quick and easy way to access Client records by allowing Users to either scan the bar code on the Cards or by entering the ID number that is displayed on the Card.

Adobe® Acrobat® Reader is required to create and issue ID cards. A free copy is available for down at http://www.adobe.com/products/acrobat/readstep2.html. Avery™ Permanent Durable ID Labels (10 per sheet) are recommended for the cards.

Client ID cards can be created with or without a photo. If a photo is to be included, that photo must be listed as a File Attachment on the Client's *Profile* screen. The file must be in JPEG (.jpg) format, and it must have both the words "Client" and "Photo" in the file description. If these conditions are met, the photo will be automatically included on the Client's ID Card.

Creating an ID Card for one Client can be performed on the Client's *Profile* screen in ClientPoint. Simply choose the **Card Orientation** and click the **Issue ID Card** button. ServicePoint takes care of the rest. Once created, it is recommended that the User review the Card for accuracy and then print it using the print option within Adobe Acrobat Reader.

The SkanPoint Module can also be used to create ID Cards for all Clients a User can access or for a group of Clients who are part of a Client List. (Figure 77)

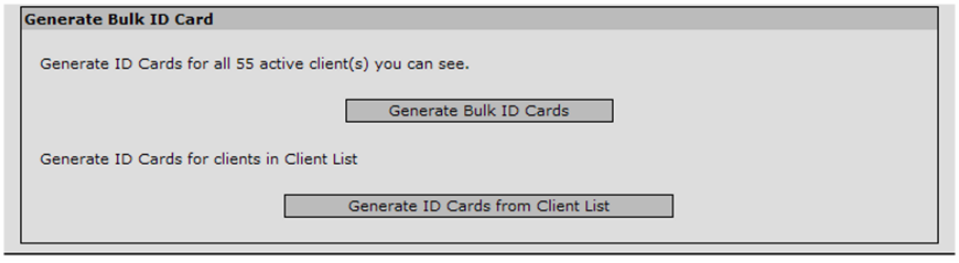

Figure 77: Generate Bulk ID Card Section

All Clients with an associated picture file meeting the requirements stated above will have their photo included on their ID cards automatically.

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IN SUMMARY …

- SkanPoint gives Users the ability to access Client records using the Client ID number.
- Client ID Cards can be scanned to access a Client record, bypassing the search function on the **Client Search** screen.
- Client Lists are used to provide the capability to record Services for a group of Clients.
- SkanPoint must be turned on both at the system level and for each user designated to use this feature.

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CHALLENGE STEP …

1) Use SkanPoint to provide a Service to at least three Clients
   a) Create a List for these Clients
2) Manage that List: add two additional Clients into that List
3) Use that List to provide a different Service for those Clients
4) Create a New List for Future Use
5) Print ID Cards for most of the Clients in your list, but not all.

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CHAPTER 7: REPORTS

CHAPTER OBJECTIVES

- Describe the three major report categories.
- Discuss the function User Access Levels play in accessing ServicePoint reports.
- List the purpose of each Audit and Provider Report.
- Describe how customized ServicePoint reports can be created.

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INTRODUCTION

The Reports module is where Users go to create standard and customized reports of Client and User activities in ServicePoint.

The Reports screen is role-sensitive. This means that options are either visible or not visible depending on the User's Access Level. For example, the screen below is what would be viewed by a System Administrator. An Agency Administrator does not have access to all three of the Audit Reports, but does have access to all other Reports on this screen. A Case Manager does not have access to any of the Audit Reports. A User with the Agency Staff Access Level does not have access to any reports and so does not even see the Reports Tab in the Navigation Bar.

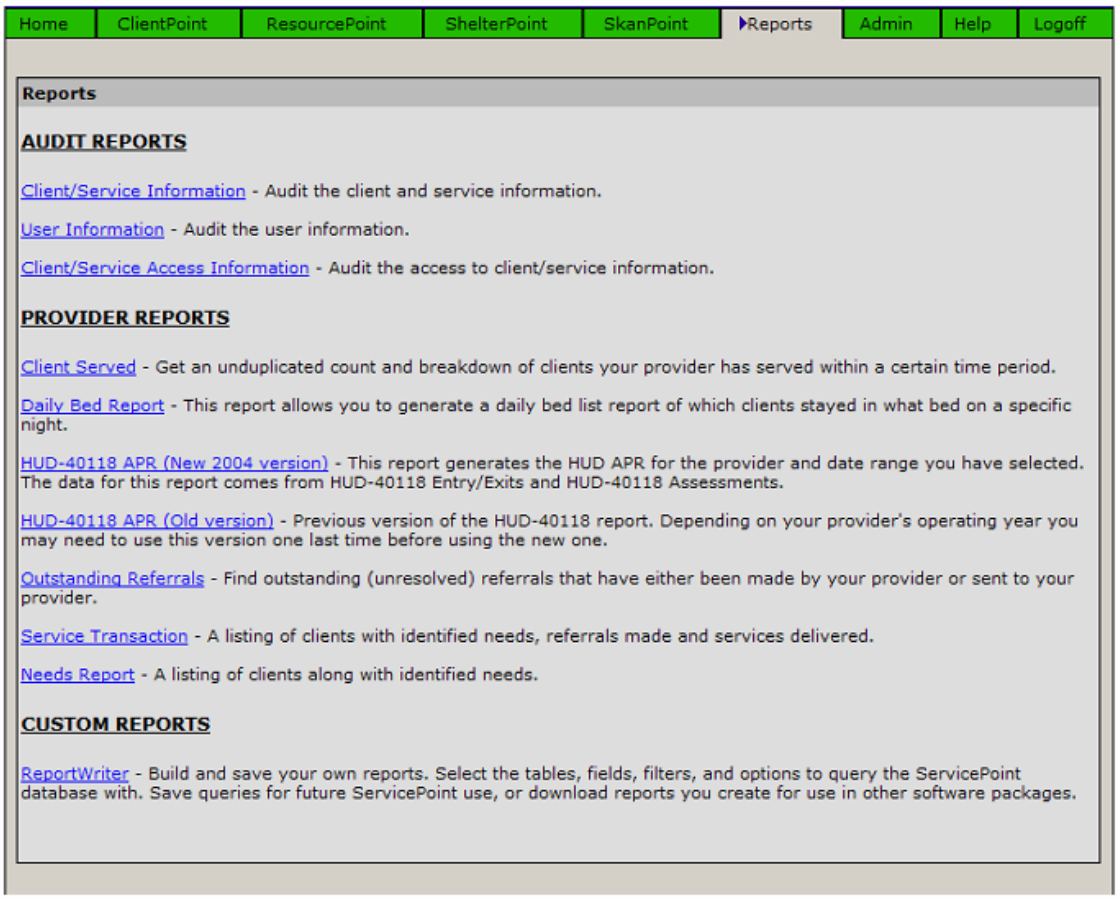

Figure 78: Reports Module Main Page

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AUDIT REPORTS

Audit reports permit Administrators to examine and verify system usage activities within ServicePoint. Users can select a specific Provider alone or with all of its Child Providers for which to run these reports. The available Providers in this dropdown menu are determined by the User's Access Level.

CLIENT/SERVICE INFORMATION

This report displays which Users have either viewed, edited, added, or deleted information to any aspect of any Client record and when the action was performed. This report satisfies one of HIPAA's requirements. Prior to ServicePoint version 3.07, only System Administrators have the ability to run this report. In version 3.07, Agency Administrators will be allowed to run this report.

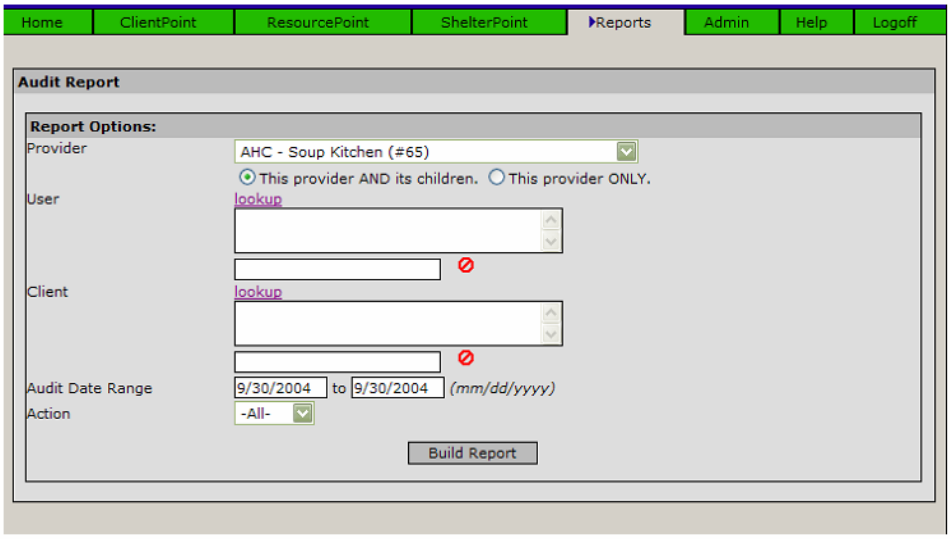

Figure 79: Client Service Information Report Options Screen

Users can narrow the report by choosing a specific Provider, User, Client and date range to audit (Figure 79). Leaving the User and Client fields blank would run the report for all Users and all Clients. The audit date range is optional. Leaving it blank will run the report for the entire existence of the site. The Action that was performed can be narrowed using the **Action** field to

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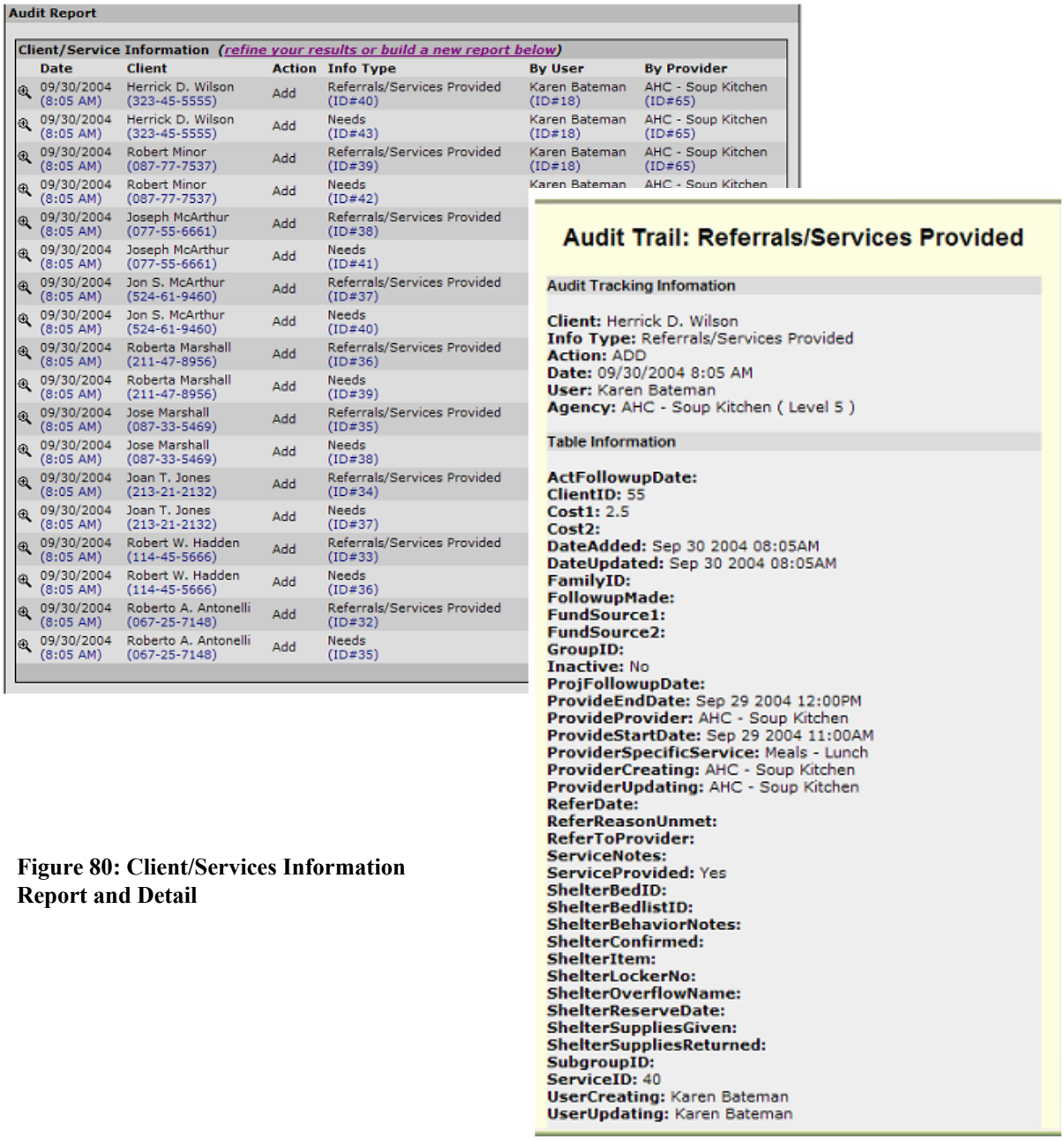
show only those actions involving adding, deleting, editing or viewing of records. The **Build Report** button initiates the generation of the report.

The **View Detail** icon (🔍) allow Users to analyze the details of the chosen line item. (Figure 80)



Audit Report

Client/Service Information (*refine your results or build a new report below*)

	Date	Client	Action	Info Type	By User	By Provider
🔍	09/30/2004 (8:05 AM)	Herrick D. Wilson (323-45-5555)	Add	Referrals/Services Provided (ID#40)	Karen Bateman (ID#18)	AHC - Soup Kitchen (ID#65)
🔍	09/30/2004 (8:05 AM)	Herrick D. Wilson (323-45-5555)	Add	Needs (ID#43)	Karen Bateman (ID#18)	AHC - Soup Kitchen (ID#65)
🔍	09/30/2004 (8:05 AM)	Robert Minor (087-77-7537)	Add	Referrals/Services Provided (ID#39)	Karen Bateman (ID#18)	AHC - Soup Kitchen (ID#65)
🔍	09/30/2004 (8:05 AM)	Robert Minor (087-77-7537)	Add	Needs (ID#42)	Karen Bateman	AHC - Soup Kitchen
🔍	09/30/2004 (8:05 AM)	Joseph McArthur (077-55-6661)	Add	Referrals/Services Provided (ID#38)		
🔍	09/30/2004 (8:05 AM)	Joseph McArthur (077-55-6661)	Add	Needs (ID#41)		
🔍	09/30/2004 (8:05 AM)	Jon S. McArthur (524-61-9460)	Add	Referrals/Services Provided (ID#37)		
🔍	09/30/2004 (8:05 AM)	Jon S. McArthur (524-61-9460)	Add	Needs (ID#40)		
🔍	09/30/2004 (8:05 AM)	Roberta Marshall (211-47-8956)	Add	Referrals/Services Provided (ID#36)		
🔍	09/30/2004 (8:05 AM)	Roberta Marshall (211-47-8956)	Add	Needs (ID#39)		
🔍	09/30/2004 (8:05 AM)	Jose Marshall (087-33-5469)	Add	Referrals/Services Provided (ID#35)		
🔍	09/30/2004 (8:05 AM)	Jose Marshall (087-33-5469)	Add	Needs (ID#38)		
🔍	09/30/2004 (8:05 AM)	Joan T. Jones (213-21-2132)	Add	Referrals/Services Provided (ID#34)		
🔍	09/30/2004 (8:05 AM)	Joan T. Jones (213-21-2132)	Add	Needs (ID#37)		
🔍	09/30/2004 (8:05 AM)	Robert W. Hadden (114-45-5666)	Add	Referrals/Services Provided (ID#33)		
🔍	09/30/2004 (8:05 AM)	Robert W. Hadden (114-45-5666)	Add	Needs (ID#36)		
🔍	09/30/2004 (8:05 AM)	Roberto A. Antonelli (067-25-7148)	Add	Referrals/Services Provided (ID#32)		
🔍	09/30/2004 (8:05 AM)	Roberto A. Antonelli (067-25-7148)	Add	Needs (ID#35)		

Audit Trail: Referrals/Services Provided

Audit Tracking Infomation

Client: Herrick D. Wilson
Info Type: Referrals/Services Provided
Action: ADD
Date: 09/30/2004 8:05 AM
User: Karen Bateman
Agency: AHC - Soup Kitchen (Level 5)

Table Information

ActFollowupDate:
ClientID: 55
Cost1: 2.5
Cost2:
DateAdded: Sep 30 2004 08:05AM
DateUpdated: Sep 30 2004 08:05AM
FamilyID:
FollowupMade:
FundSource1:
FundSource2:
GroupID:
Inactive: No
ProjFollowupDate:
ProvideEndDate: Sep 29 2004 12:00PM
ProvideProvider: AHC - Soup Kitchen
ProvideStartDate: Sep 29 2004 11:00AM
ProviderSpecificService: Meals - Lunch
ProviderCreating: AHC - Soup Kitchen
ProviderUpdating: AHC - Soup Kitchen
ReferDate:
ReferReasonUnmet:
ReferToProvider:
ServiceNotes:
ServiceProvided: Yes
ShelterBedID:
ShelterBedlistID:
ShelterBehaviorNotes:
ShelterConfirmed:
ShelterItem:
ShelterLockerNo:
ShelterOverflowName:
ShelterReserveDate:
ShelterSuppliesGiven:
ShelterSuppliesReturned:
SubgroupID:
ServiceID: 40
UserCreating: Karen Bateman
UserUpdating: Karen Bateman

Figure 80: Client/Services Information Report and Detail

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USER INFORMATION

The User Information Audit report shows which Users have been added, deleted or edited. Again, the User can enter a Provider or a date range to narrow the results that will be displayed. (Figure 81)

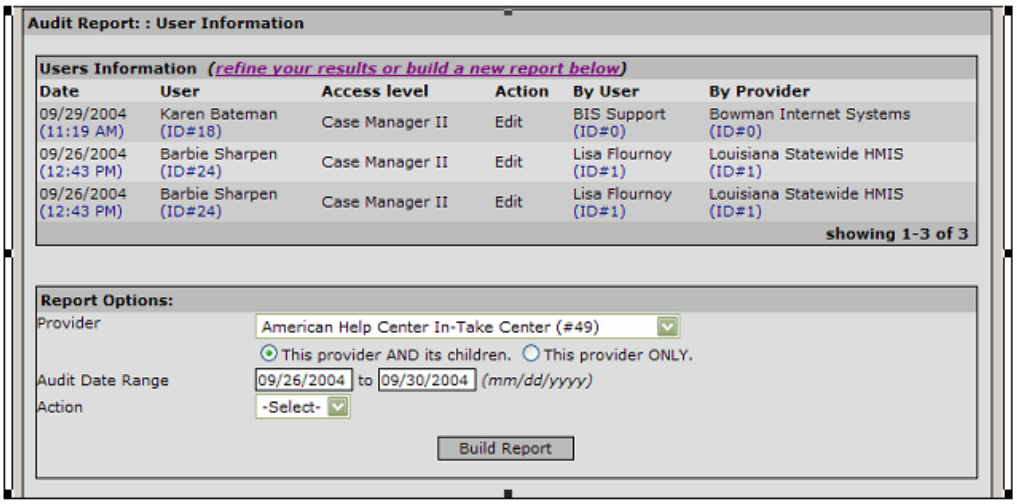

Figure 81: User Information Audit Report Options with Results

This Audit Report is available to both Agency and System Administrators.

CLIENT/SERVICE ACCESS INFORMATION

This report audits the access to Client Service information (the first audit report). This report is only accessible to System Administrators. (Figure 82)

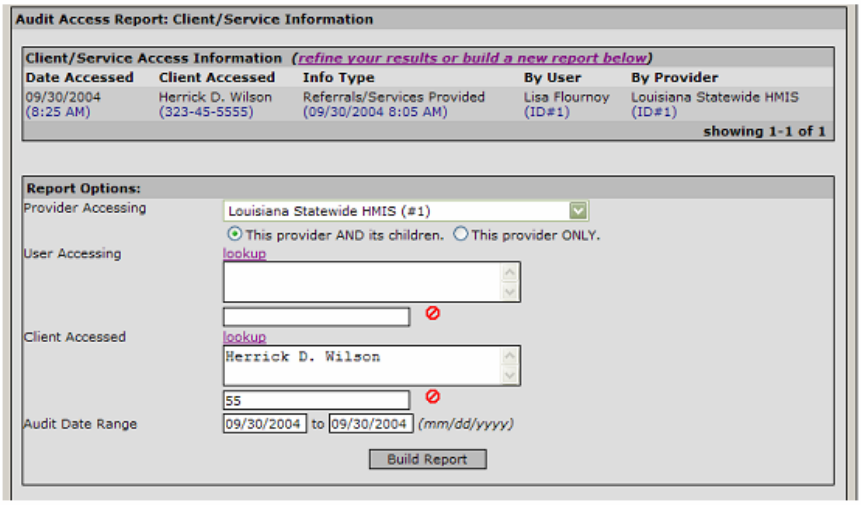

Figure 82: Client/Service Access Report Options Screen with Results

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PROVIDER REPORTS

There are seven "canned" Provider Reports within ServicePoint. They are the most widely used reports by ServicePoint Users. The Provider's for which this report can be run is dependent upon the User's Access Level.

CLIENT SERVED

The Client Served report provides an unduplicated account and breakdown of Clients a Provider has served within a certain period. The report can be run on a system-wide basis or it can be narrowed to a specific Provider alone, or with its Child Providers. (Figure 83)

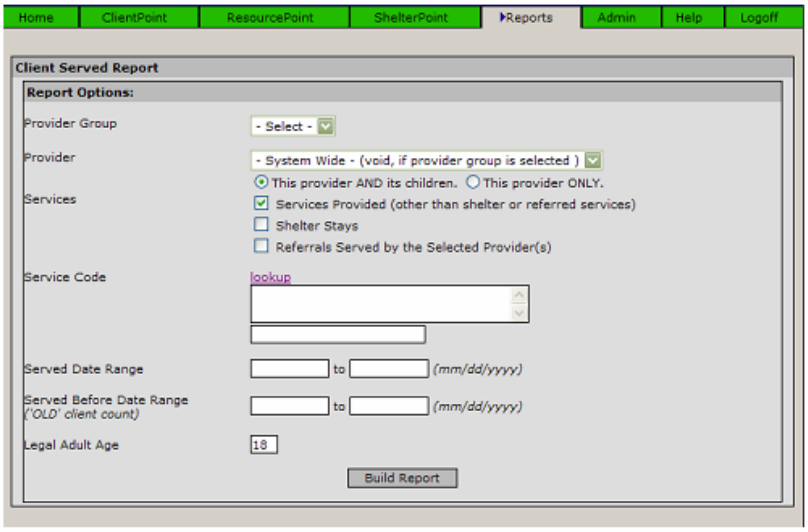

Figure 83 : Client Served Report Options Page

This report includes the ability to include those SERVICES the chosen Provider (and its children) have provided, SERVICES provided that were non-shelter stays and REFERRALS that were converted to a SERVICE. Users can narrow results by a particular Service Code or can leave the **Service Code** area blank and run the report for all Service Codes. Specifying the **Service Date Range** is the same as in previously described reports. The **Served Before Date Range** is used as a comparison date range, e.g. to compare the Services Provided this quarter with last quarter. The **Legal Adult Age** field is used to differentiate Children from Adults. This field is left for the User to define since some communities may differ in what age constitutes being an adult.

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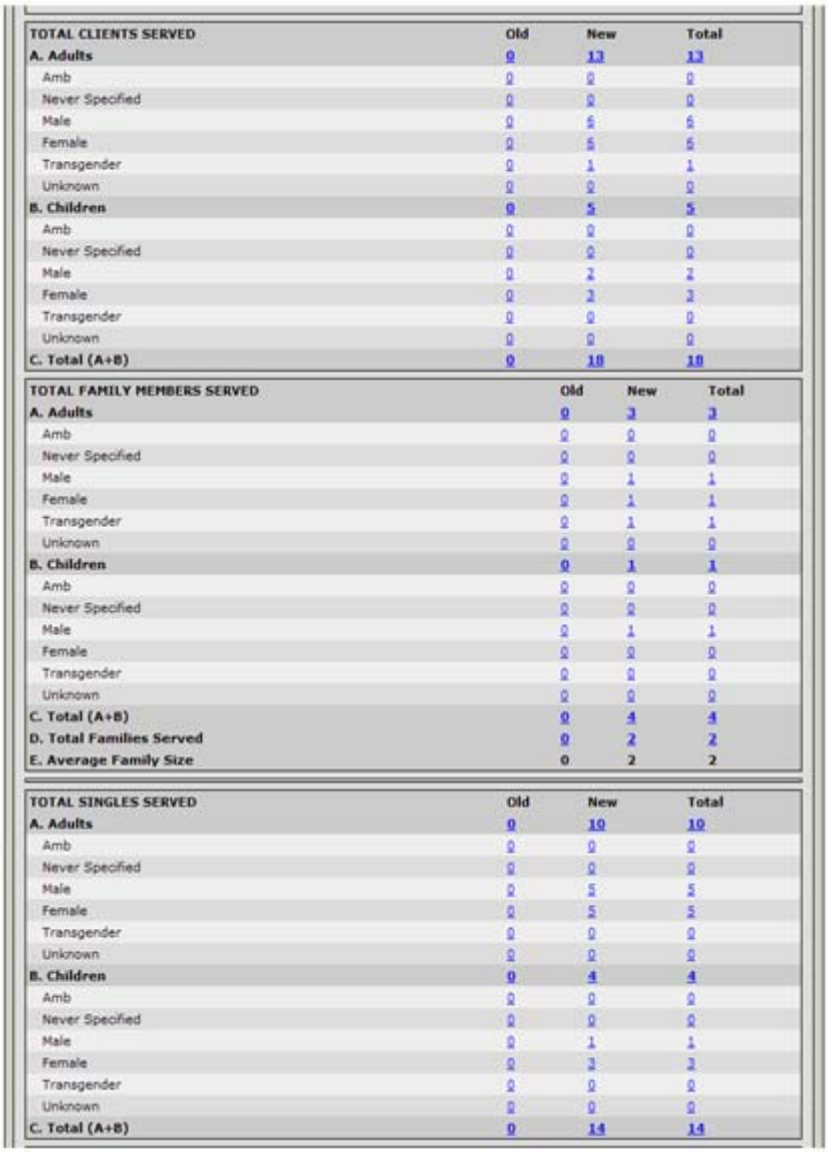

TOTAL CLIENTS SERVED	Old	New	Total
A. Adults	0	13	13
Amb	0	0	0
Never Specified	0	0	0
Male	0	6	6
Female	0	6	6
Transgender	0	1	1
Unknown	0	0	0
B. Children	0	5	5
Amb	0	0	0
Never Specified	0	0	0
Male	0	2	2
Female	0	3	3
Transgender	0	0	0
Unknown	0	0	0
C. Total (A+B)	0	18	18

TOTAL FAMILY MEMBERS SERVED	Old	New	Total
A. Adults	0	3	3
Amb	0	0	0
Never Specified	0	0	0
Male	0	1	1
Female	0	1	1
Transgender	0	1	1
Unknown	0	0	0
B. Children	0	1	1
Amb	0	0	0
Never Specified	0	0	0
Male	0	1	1
Female	0	0	0
Transgender	0	0	0
Unknown	0	0	0
C. Total (A+B)	0	4	4
D. Total Families Served	0	2	2
E. Average Family Size	0	2	2

TOTAL SINGLES SERVED	Old	New	Total
A. Adults	0	10	10
Amb	0	0	0
Never Specified	0	0	0
Male	0	5	5
Female	0	5	5
Transgender	0	0	0
Unknown	0	0	0
B. Children	0	4	4
Amb	0	0	0
Never Specified	0	0	0
Male	0	1	1
Female	0	3	3
Transgender	0	0	0
Unknown	0	0	0
C. Total (A+B)	0	14	14

Figure 84: Upper Part of Clients Served Report

The **New** column refers to the served date range and the **Old** column refers to the served before date range. Users can compare what was done from week to week, month to month, and quarter to quarter simply based on the **Served** and **Served Before** date ranges. (Figure 84)

Notice that the values listed are shown as **hyperlinks**. Users can see Clients comprise these statistics by clicking on the desired link. (Figure 85 below)

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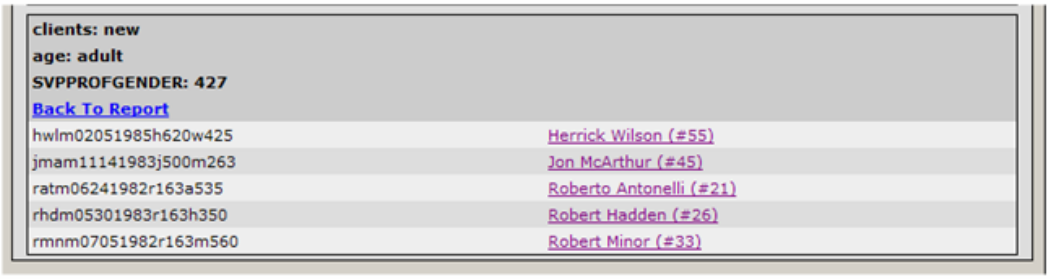

Figure 85 : Breakdown Screen of Clients Served Report

The breakdown of the number displays the Client name, Client ID number and the Client's dynamic ID (referenced on Page 38). If a Client has two different static ID numbers but only one dynamic ID number, then a Client has been duplicated in the system. If two people have same name but different static ID numbers and dynamic ID numbers, then there are two different people with the same name.

DAILY BED REPORT

The Daily Bed report allows the User to generate a daily bedlist report of which Clients stayed in which bed on a specific night. The default is to run a daily report. However, the date range can be modified to run the report for a longer period. (Figure 86)

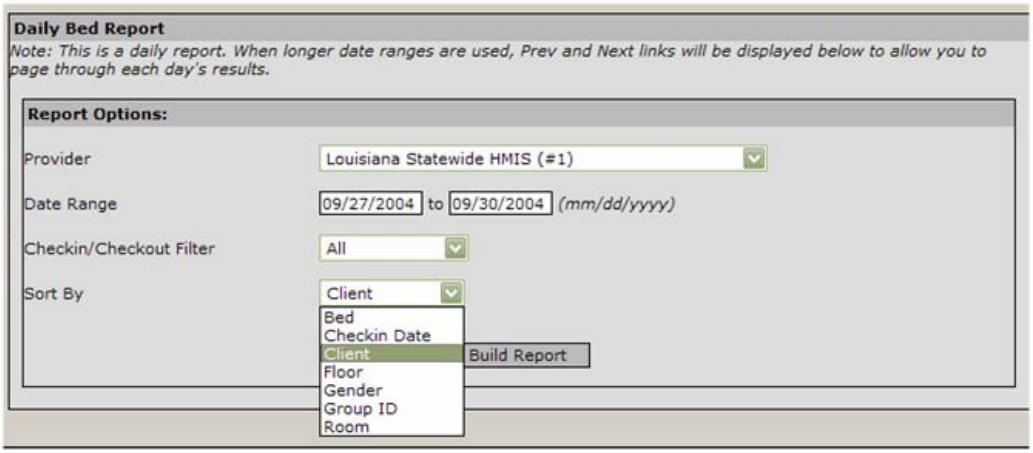

Figure 86: Daily Bed Report Options Screen

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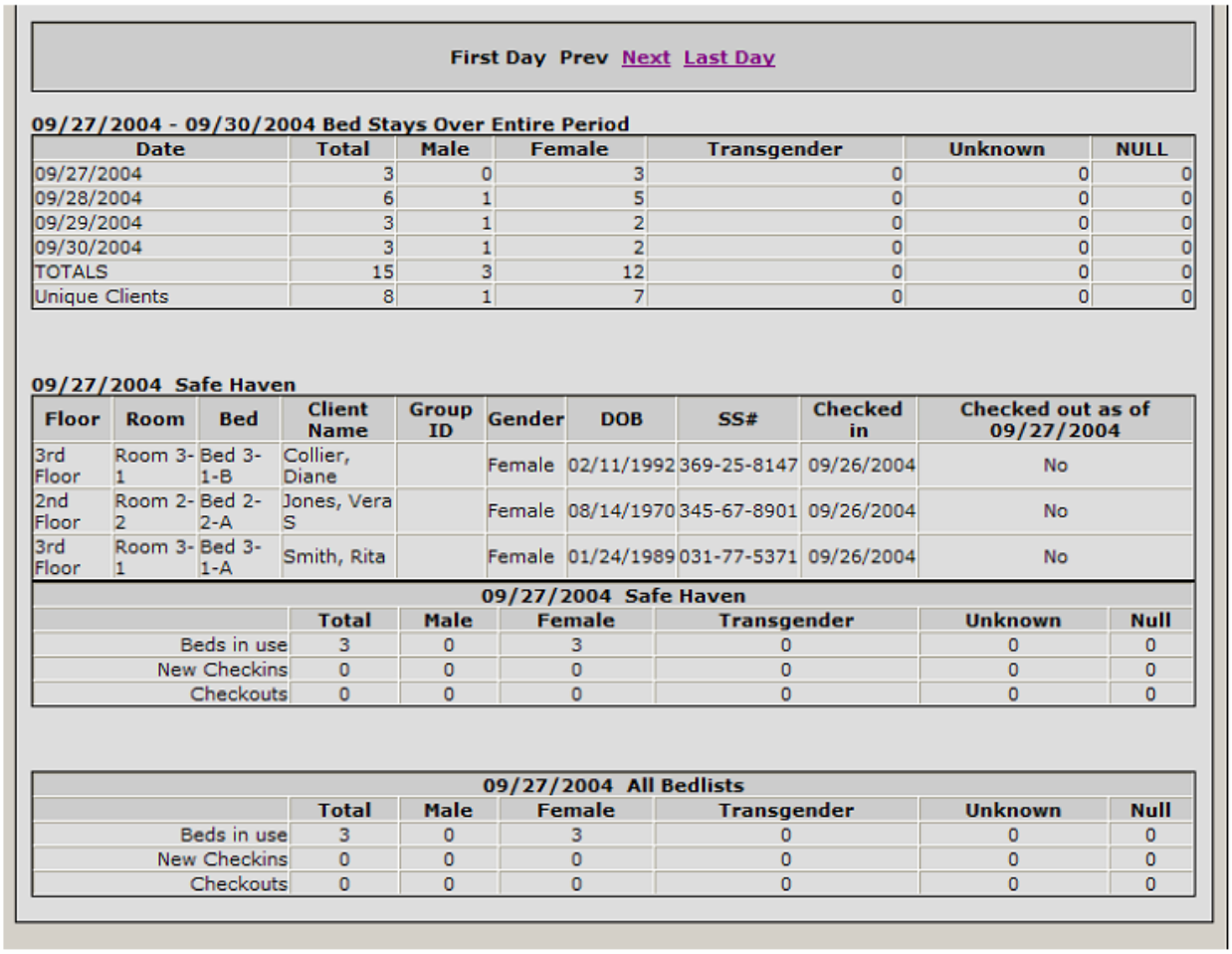
This report can only be run for one Provider at a time. The type of information to be pulled can be filtered based on Beds in Use, New Check-Ins or Checkouts. Sort preference can also be defined with the SORT BY dropdown list.

If the report is being created for just one day, the top portion of the report shown below (Figure 87) will not be visible. The purpose of that section is to provide a summary of total Clients served over a period of more than one day. The **Next** hyperlink accesses the next day within the range specified in the Report Option screen and **Last Day** accesses the last day within the range specified.



First Day Prev Next Last Day

09/27/2004 - 09/30/2004 Bed Stays Over Entire Period

Date	Total	Male	Female	Transgender	Unknown	NULL
09/27/2004	3	0	3	0	0	0
09/28/2004	6	1	5	0	0	0
09/29/2004	3	1	2	0	0	0
09/30/2004	3	1	2	0	0	0
TOTALS	15	3	12	0	0	0
Unique Clients	8	1	7	0	0	0

09/27/2004 Safe Haven

Floor	Room	Bed	Client Name	Group ID	Gender	DOB	SS#	Checked in	Checked out as of 09/27/2004
3rd Floor	Room 3-1	Bed 3-1-B	Collier, Diane		Female	02/11/1992	369-25-8147	09/26/2004	No
2nd Floor	Room 2-2	Bed 2-2-A	Jones, Vera S		Female	08/14/1970	345-67-8901	09/26/2004	No
3rd Floor	Room 3-1	Bed 3-1-A	Smith, Rita		Female	01/24/1989	031-77-5371	09/26/2004	No

09/27/2004 Safe Haven

	Total	Male	Female	Transgender	Unknown	Null
Beds in use	3	0	3	0	0	0
New Checkins	0	0	0	0	0	0
Checkouts	0	0	0	0	0	0

09/27/2004 All Bedlists

	Total	Male	Female	Transgender	Unknown	Null
Beds in use	3	0	3	0	0	0
New Checkins	0	0	0	0	0	0
Checkouts	0	0	0	0	0	0

Figure 87: Daily Bed Report Options with Results

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HUD-40118 APR

The HUD Report is usually run for one provider at a time, though with ServicePoint 3.05+ System Administrators can run this report for Provider Groups. The presence of a HUD Entry is the minimum requirement for this report. The information that is pulled into this report is primarily based on the snapshots taken upon Entry into and Exit from a "program." For a detailed analysis of this report, please reference the HUD Tech Note, available through the Self Service Portal.

The HUD Report is not intended to be printed out, placed in an envelope, and sent to HUD. Although the majority of questions are answered in ServicePoint's HUD report, some questions on the HUD-40118 APR require evaluative answers not captured in ServicePoint.

OUTSTANDING REFERRALS

The outstanding Referrals report allows Users to find outstanding or unresolved REFERRALS that have either been issued to his/her Provider or sent to his/her Provider by another Provider. (Figure 88)

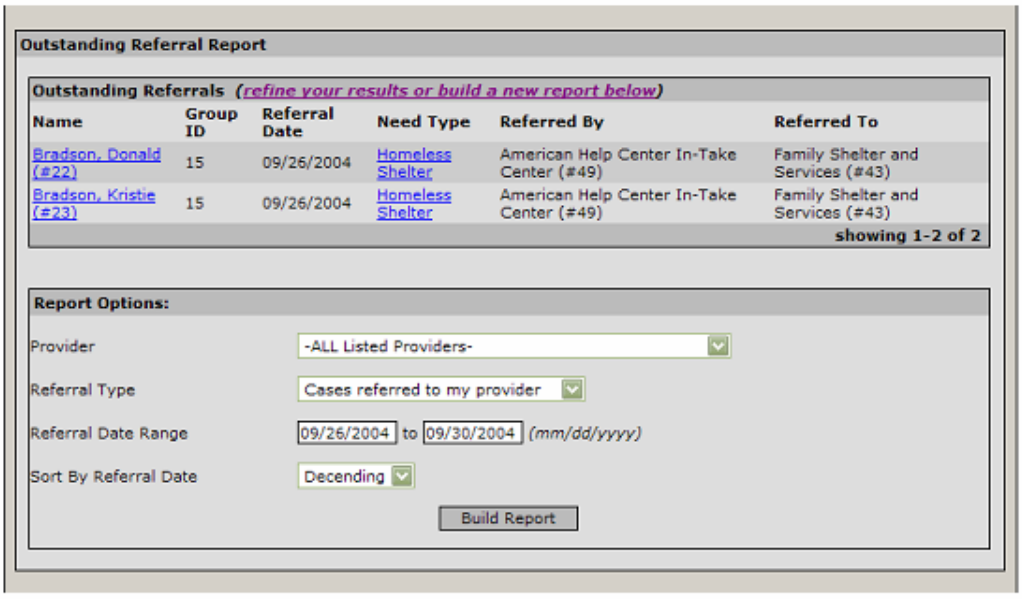

Figure 88 : Outstanding Referrals Report Options

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SERVICE TRANSACTION

The Service Transaction report is a listing of Clients with identified NEEDS, REFERRALS made, and SERVICES delivered. This report can be run to report on a system-wide basis or for a particular Provider and its children. A User can include filters based on NEEDS that were entered, Services provided, Shelter stays, NEEDS referred to, and REFERRALS issued by the chosen Provider. As with the other reports, Users can narrow the results reported by a particular Service Code, the date ranges filters for the date the NEED was identified and the date the SERVICES were actually provided. (Figure 89)

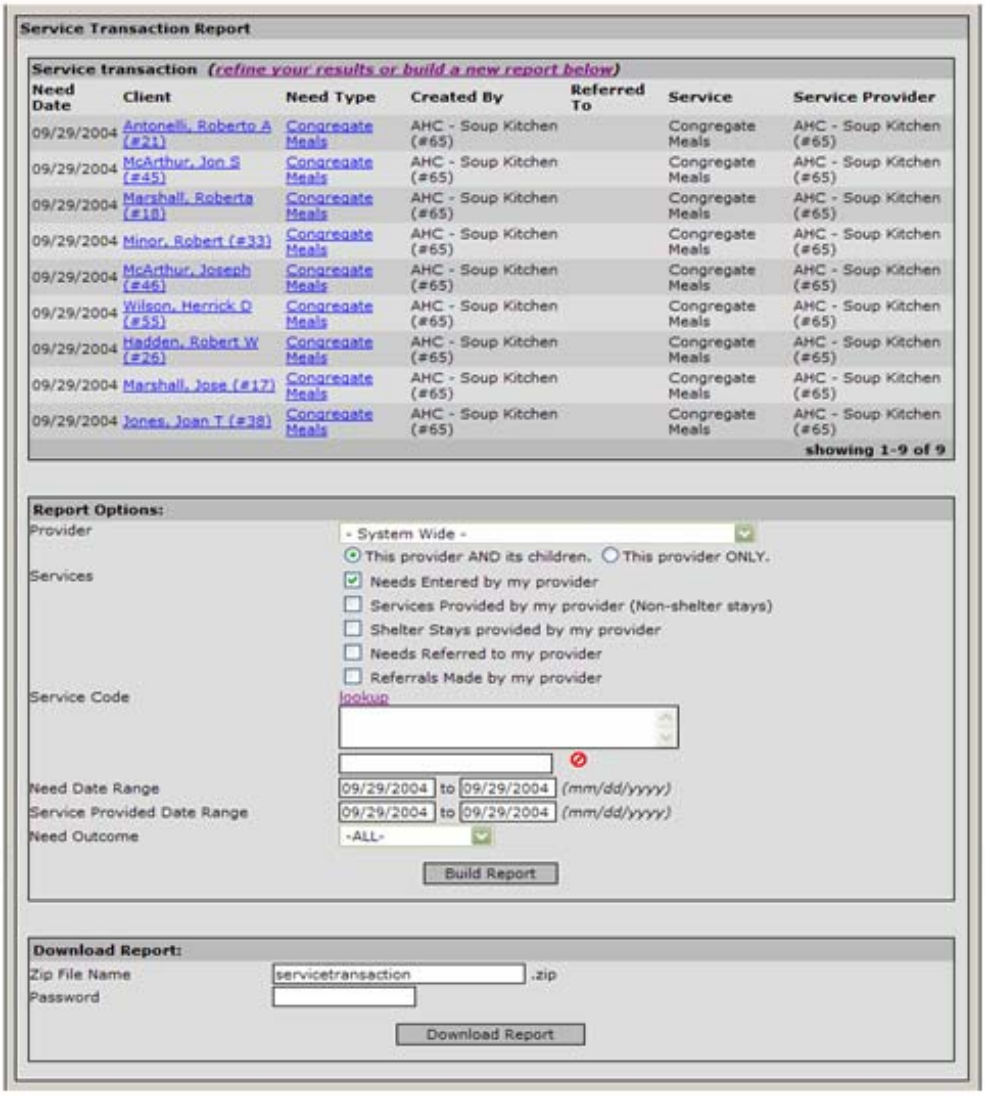

Figure 89: Service Transaction Report Options with Results

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NEEDS REPORT

The Needs Report displays the NEEDS that have been identified by a particular Provider (and its Child Providers, if chosen). It breaks down the NEEDS into those identified for children and adults. Even though it is possible to determine which Clients constitute the total numbers of Clients with identified Needs, it is not possible to determine which Needs belong to each Client.

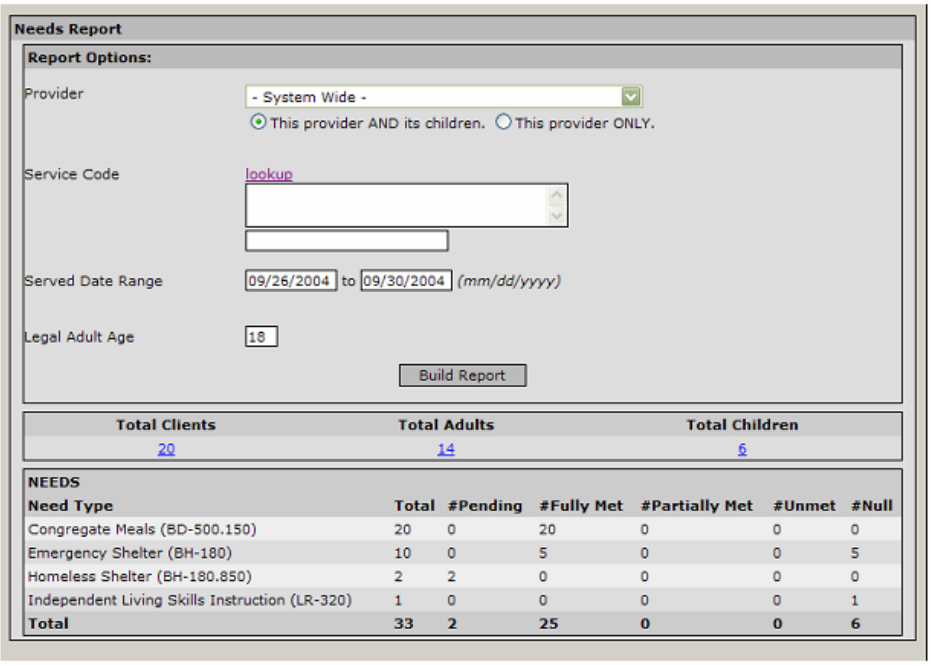

Figure 90: Needs Report Options with Results

CUSTOM REPORTS

ServicePoint's ReportWriter is essentially a "data gripper." If the information has been entered into ServicePoint, the general rule of thumb is that it can be extracted using ReportWriter. Users can select one or more of ServicePoint's tables and any or all fields associated with those tables to produce a custom report. Filters can be applied to narrow the results of the report. Finally, the queries Users create with ReportWriter can be saved for future use. For a detailed example of how to use ReportWriter, please see the Help File.

The important thing to know about ReportWriter is that the information a User can pull into a Custom Report is entirely dependent upon that User's access level and his/her default Provider All ReportWriter reports can be downloaded into Excel.

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IN SUMMARY …

- Reports are security-sensitive and depend on the access level of the User.
- Reports are grouped into three major areas: Audit, Provider and Custom.
- End Users cannot access Audit Reports; Agency Administrators have limited access to Audit Reports; and System Administrators have access to all three Audit reports.
- Provider reports are accessible by all Users who have access to the Report Module.
- Provider reports supply Provider-specific and/or system-wide information related to identified NEEDS, SERVICES and REFERRALS.
- Custom reports pull information directly from ServicePoint tables to provide customized reporting capabilities.
- ReportWriter reports can be downloaded using .csv format.

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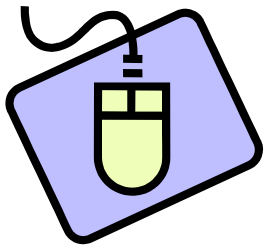
CHALLENGE STEPS ...



1) Create a New Client
2) Create a New Household
3) Add at least 2 Household members
4) Enter a ROI for the entire Household
5) Give Household a HUD 40118 Entry
6) Answer 4 HUD Assessment questions (on the Entry screen)
7) Add a Goal for the entire Household
8) Add a Followup
9) Add a Need
10) Add a Service
11) Add an Exit for the entire Household
12) Add/Change 4 HUD Assessment questions (on the Exit screen)
13) Run the Client Served Report [give a date range]
14) Create a Custom Report (ReportWriter)
    a) Two Tables, One Assessment, One Subassessment
        i) Two fields from each

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CHAPTER 8: SYSTEM SETUP AND CONFIGURATION

CHAPTER OBJECTIVES

- Explain the purpose of the Admin Module and its associated hyperlinks.
- Discuss who can add, edit and delete System and Agency NewFlash messages.
- Recognize the proper usage of Shadow Mode and authorized users.
- Discuss configuration tasks that should be performed prior to adding Providers.
- List features and options that can be configured on a system wide basis within ServicePoint.
- Identify steps in the allocation of user licenses to Providers.
- Discuss considerations in the design of the Provider structure.
- Create and configure Parent and Child Providers.
- Describe the elements involved in securing Client data.
- List the Golden Rules of Data Security.
- Recognize default Provider restrictions within a Provider Profile.
- View and configure Provider exceptions related to Provider security.

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ADMINISTRATIVE TASKS

Now that you have viewed ServicePoint from a non-administrative role, we are ready to look at activities and tasks associated with system configuration and management.

SYSTEM DOCUMENTATION

Good documentation is the keystone of a successful ServicePoint implementation. From establishing policies and procedures to determining the Provider structure, a successful System Administrator will carefully plan and document his/her ServicePoint system configuration. To assist with setup planning, there are several worksheets listed in the Appendix Section of this document.

If you wish to modify the worksheets, your Instructor will be able to assist you in obtaining a Word formatted file for editing.

Prior to configuring your ServicePoint system, it is highly recommended that the System Administrator clearly recognize what data is to be collected and understand specifically how that data is already collected within your community.

ADMIN MODULE

The Admin Page is only accessible to Users designated to serve in an administrative role within ServicePoint. System Administrators have access to all administrative functions within the ServicePoint application. Agency Administrators have access to the **Users**, **Admin Provider** and **Agency News Administration** administrative functions. (Figure 91 below)

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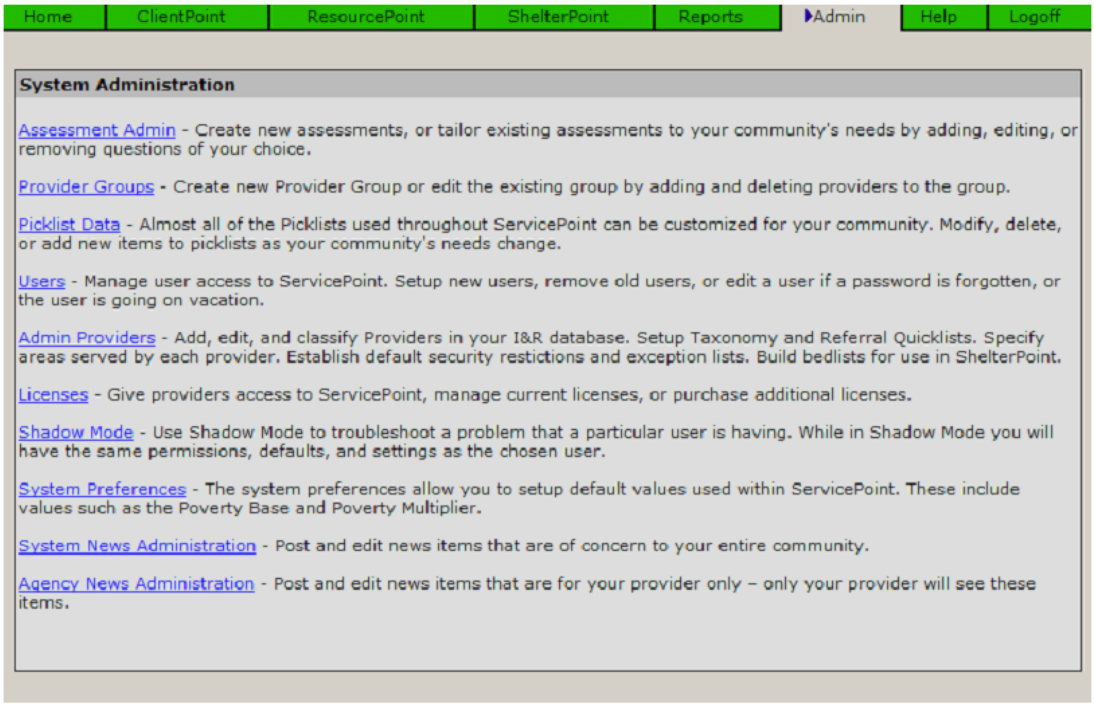

Figure 91: Admin Main Screen

System and Agency News Administration

The **System** and **Agency NewsFlash** sections on the Home Page are two tools for providing a quick and easy way to keep Users informed of particular events and activities within their community. The edit screens for these information sections can be accessed either through the Admin module (**System/Agency News Administration**) or through the Home Page itself (**Update News** ❸). (Figure 92 below)

The **NewsFlash - System** ❶ section is used to display messages and hyperlinks (**Full Story**) to other websites that are accessible to all Users within the community. This section can be updated only by a System Administrator II.

The **NewsFlash - Agency** ❷ section displays information for a specific Provider and is visible only to Users who either have that Provider as his/her default Provider or have been given explicit permission to enter data for that Provider. This section can be changed or updated by System and Agency Administrators.

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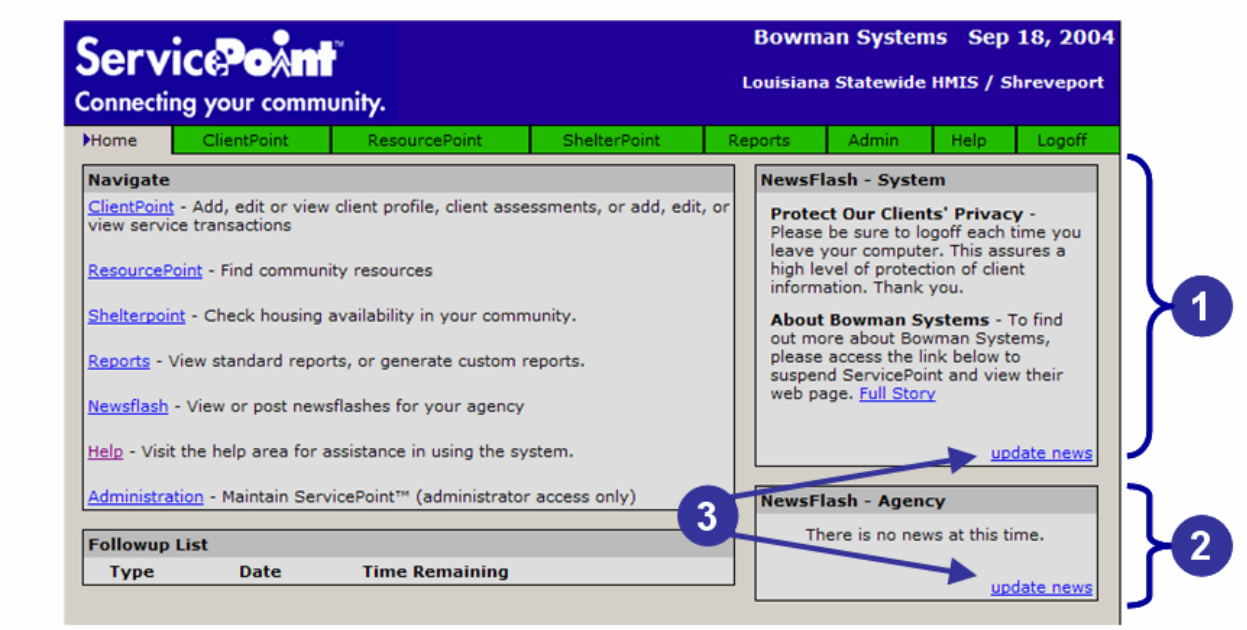

Figure 92 Home Page with Update Option

Clicking on either the Update News or the New Administration links will allow Administrators to add, edit, delete and or change the sequence of messages in the NewsFlash sections. (Figure 93)

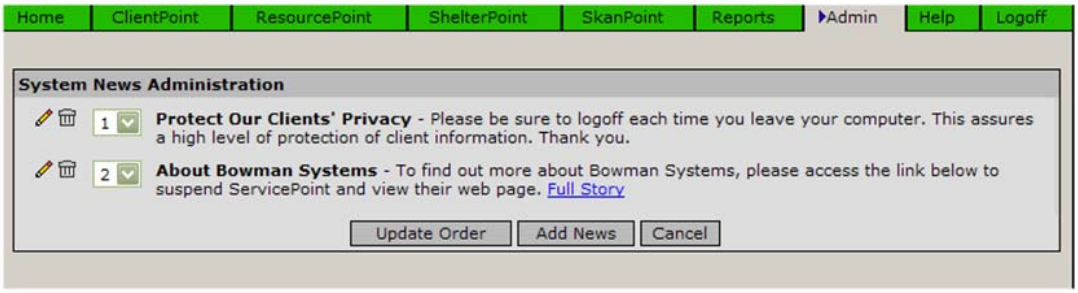

Figure 93: System NewsFlash Page

- To add a new message, select the **Add News** button.
- To edit a message, select the edit icon ( ).
- To delete a message, select the delete icon ( ).
- To change the order of appears, use the dropdown field to renumber the messages and then select the **Update Order** button.

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Using Shadow Mode

There will be instances when the System Administrator will need access to a User's account for troubleshooting purposes. Shadow Mode is a mechanism that allows System Administrators to assume the view of a chosen User. It is as if the Administrator had logged in as the chosen User, and all of the chosen User's access rights and privileges will be in effect. This is a troubleshooting tool only. It should be used only to investigate reported problems with ServicePoint.

Shadow Mode should not be used to enter Client data. If used for data entry purposes, inaccuracies may occur related to security settings and reporting.

To use Shadow Mode the User must first select the default Provider of the User to be shadowed. Then the screen will refresh to display all of the selected Provider's Users. Finally, clicking on the name of the User to be "shadowed" will initiate Shadow Mode. The System Administrator will simulate the User's environment and will see only those options that are accessible to that User. (Figures 94, 95, and 96)

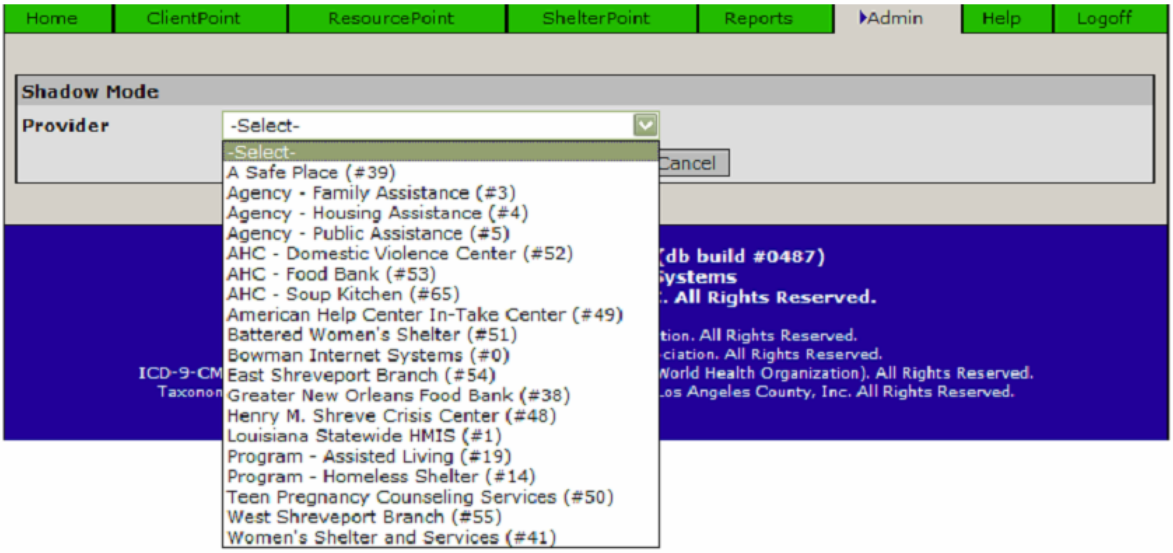

Figure 94: Shadow Mode Main screen

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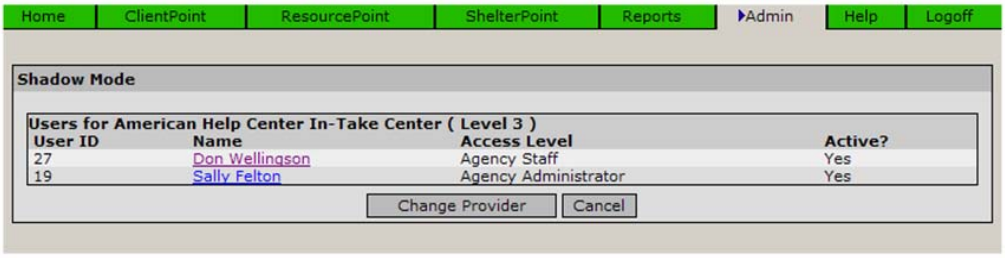

Figure 95: User Selection screen

The System Administrator will know that he/she is in Shadow Mode because an additional line listing the User being "shadowed" is displayed in the header area of the Home Page ❶.

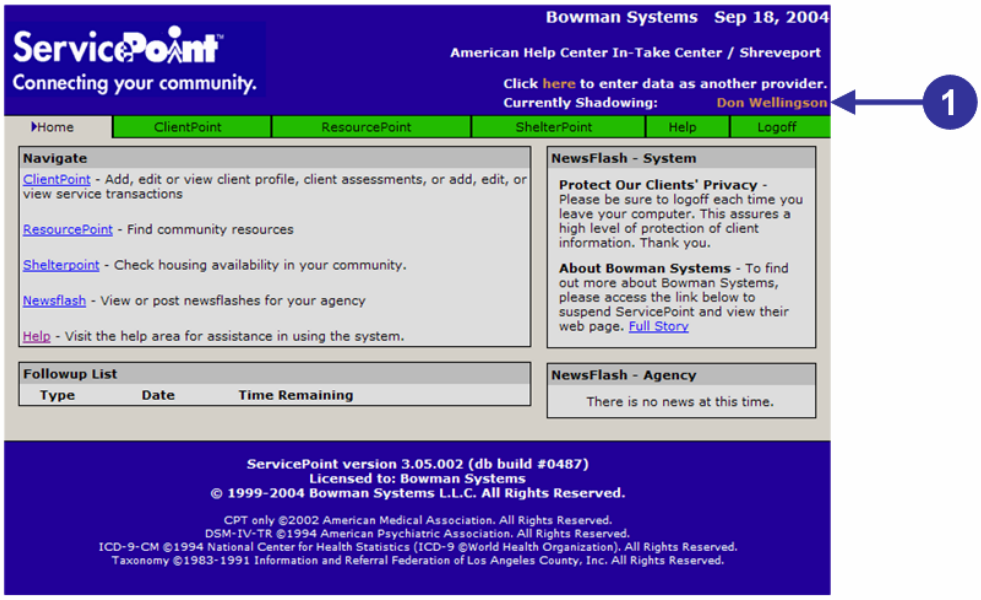

Figure 96: Home Page of Shadowed User

To discontinue shadowing a User, click on the name displayed in the **Currently Shadowing** line❶. The System Administrator will be returned to the User Selection Page with his/her Administrative status restored. If desired, another User can be selected from the same Provider.

To select another User from a different Provider, use the **Change Provider** button (Figure 95 above) to activate the Provider list for selection. The **Cancel** button will return to the Shadow Mode main screen.

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Refining PickLists

One of the major roles of the System Administrator is to "populate" or fill in the dropdown menus (Picklists) used in ServicePoint. Many Picklists can be populated during initial site setup; others may require input from Agency Administrators and End Users. Since these are system-wide objects and all Users will see the same choices in a given Picklist, careful consideration should be given to the items listed in Picklists. What may seem superfluous to one User may be vital for another User.

Picklists provide quick and consistent data entry, enabling greater reliability in the retrieval and management of data. All of ServicePoint's Picklists can be found listed in the *Picklist Administration* screen that is accessed from the Administration module via **Picklist Data**. (Figure 97)

Figure 97: Picklist Admin Screen

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Picklist items can be added, modified, or deleted. However, deleting an item from a Picklist simply makes it invisible in ServicePoint. System Administrators can "undelete" deleted items if necessary. ServicePoint keeps the "deleted" items listed on the *Editing picklist* screen for historical purposes, just in case a User selected the item for a Client. This avoids potential problems when reporting on historical data tied to a Provider or Client record. Deleted items can easily be restored by clicking the **Undelete** button. (Figure 98)

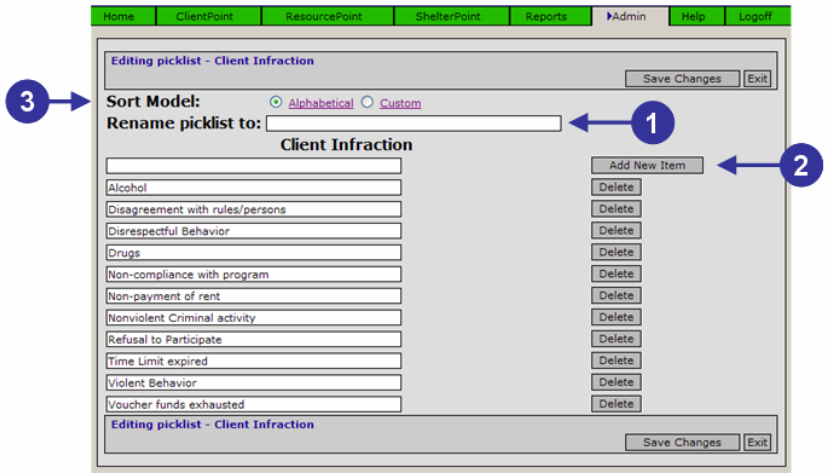

Figure 98: Client Infraction Picklist

Some Picklist items within ServicePoint are used specifically for tracking and reporting purposes. These items cannot be edited or changed, and should not be deleted. In many cases, ServicePoint will not allow any User to delete items that are required for proper system usage.

Users should NOT delete anything in ServicePoint unless he/she fully understands the ramifications of such actions. If something is deleted that cannot be restored through the ServicePoint application,, there will be a fee for restoring the deleted item.

The only related Picklists in ServicePoint are the Goals and Goal Classification - Goals Picklists. ServicePoint comes with a number of Goal Classifications and Goals already populated, however, if additional choices are needed, the Goal Classification Picklist must be populated before the Goal Picklist.

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The System Administrator must associate each Goal with a particular Goal Classification, e.g. the Goal of "Getting a GED" is associated with the Goal Classification "Education." (Figure 99)

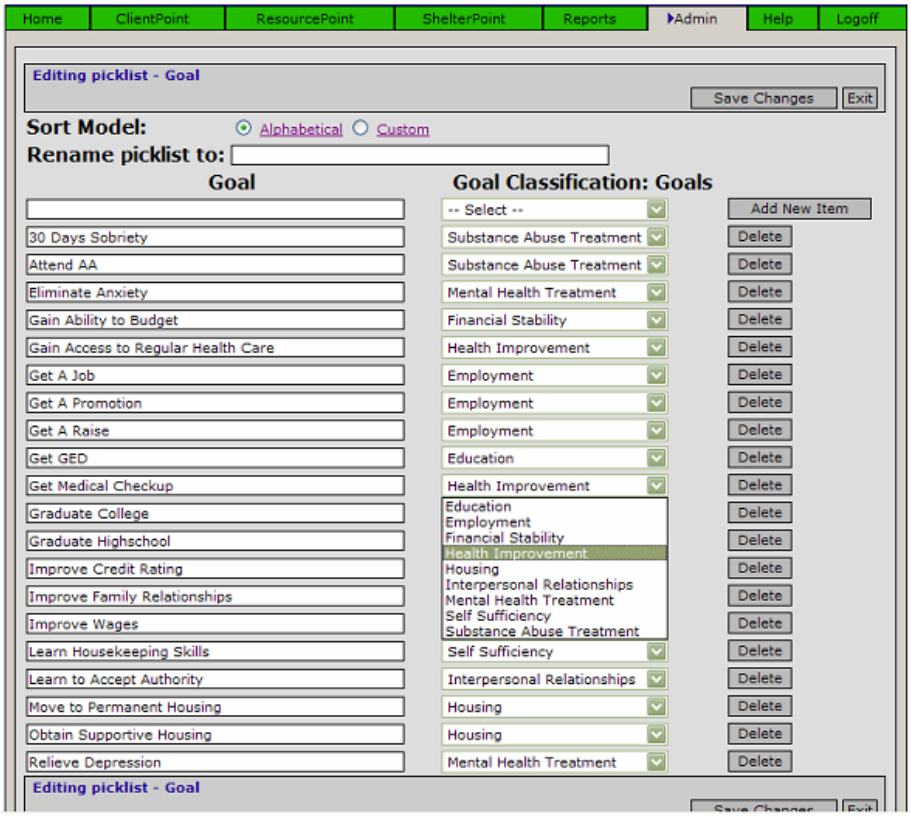

Figure 99: Goal Picklist

By default, items within a Picklist are listed alphabetically. However, if a specific order is desired, the User should select the **Custom** radio button, and click **Save Changes** to display the option to re-order each item in the chosen Picklist.

Be sure to click **Save Changes** *once editing has been completed.*

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SETTING SYSTEM PREFERENCES

System Preferences allows the System Administrator to establish default settings for his/her ServicePoint site. These settings include Poverty Base and Poverty Multiplier values (for use with the Eligibility Module only) and the option to either allow or disallow the ability to edit Case Notes. As stated earlier, this restriction may be necessary for legal reasons.

Another System Preference that can be established is the system-wide usage of SkanPoint. This checkbox must be selected in order to make SkanPoint an option in the **Special Permissions** section of the *User Profile* screen. Finally, the choice of whether to use the Release of Information as a trigger for each Provider's default security settings is listed on this screen. As noted earlier, unless otherwise informed, Bowman Systems will automatically set this to "Yes". When set to "Yes", the system requires a ROI to be entered for a Client before any information can be shared outside of the Provider. (Figure 100)

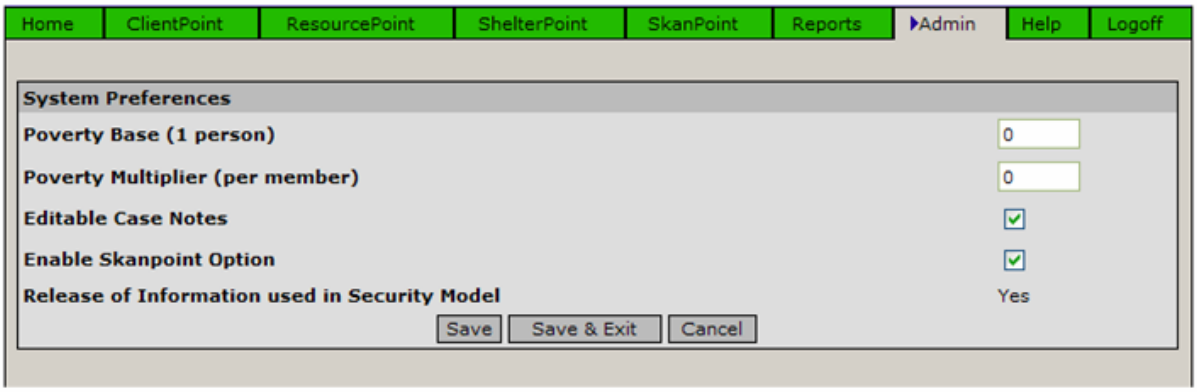

Figure 100: System Preferences Page

LICENSING

The Licenses hyperlink of the Admin Page provides the ability for System Operators and Administrators to allocate User licenses to Providers. (Figure 101 below)

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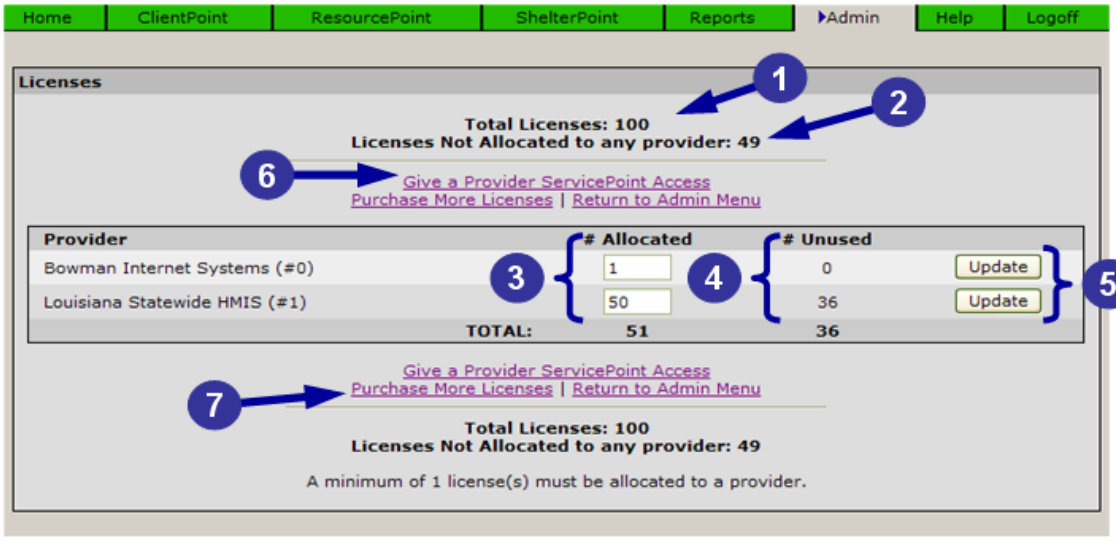

Figure 101: Licenses Window

This screen displays:

❶ The total number of ServicePoint licenses loaded in the ServicePoint site.

❷ The total licenses not yet allocated to any Level 1 Provider.

❷ The number of licenses allocated to each Level 1 Provider.

❹ The number of unused licenses by each Level 1 Provider.

The System Administrator or System Operator can update the number of licenses allocated to any Level 1 Provider. Updating is performed by changing the number of licenses allocated to a specific Provider and then clicking the applicable Update button ❺ for that Provider.

Before Users can be created, licenses must be allocated to a Level 1 Provider. These licenses can be used by any Child Provider of the Level 1 Provider.

To allocate licenses, the User must:

1. Click **Give a Provider ServicePoint Access** hyperlink ❻.
2. Choose the Level 1 Provider
3. Allocate the appropriate number of licenses to the Provider by typing in the number in the **# Allocated** column and click **Update**.

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System Administrators and System Operators may purchase additional licenses through the ServicePoint application by clicking the **Purchase More Licenses** hyperlink ❼. It will prompt the User to place an order for an entity to purchase additional licenses. ServicePoint will make the additional licenses immediately available and will issue a notification to Bowman Systems' billing department to send an invoice.

PLANNING YOUR PROVIDER STRUCTURE

To use a ServicePoint system, area agencies and programs need to be defined and entered into the system as Providers. Careful deliberation is necessary when determining the optimal Provider structure for your community. Each implementation of ServicePoint has its unique needs and considerations, and therefore, may approach this aspect of ServicePoint from many perspectives.

However, there are two typical Provider structure methodologies: a centralized structure and a decentralized structure. The centralized structure, also known as the True Hierarchical Provider Structure, has only one Level 1 Provider with all Agencies, Programs, Sites, etc. as Child Providers down the "Provider Tree." In such structures, there may be as many as five or more Provider Levels. In the decentralized structures, each Agency is typically its own Level 1 Provider, and usually has no more than two or three Levels. Each method has its own advantages. Generally speaking, the centralized structure seems to have more advantages over the decentralized structure in terms of organizational flow and reporting capabilities.

Decentralized Structures (Figure 102)

- Best for small communities without a Continuum of Care (agencies without parents).
- Less complicated in configuring Provider security for the agency.
- Usually has Client data at all but the first level.
- Clarity in assignment of Users (Agency Administrator at Level 1 and Users who perform data entry at all other levels).
- Assignment of licenses performed at agency level.
- Internal user setup controlled by the agency.

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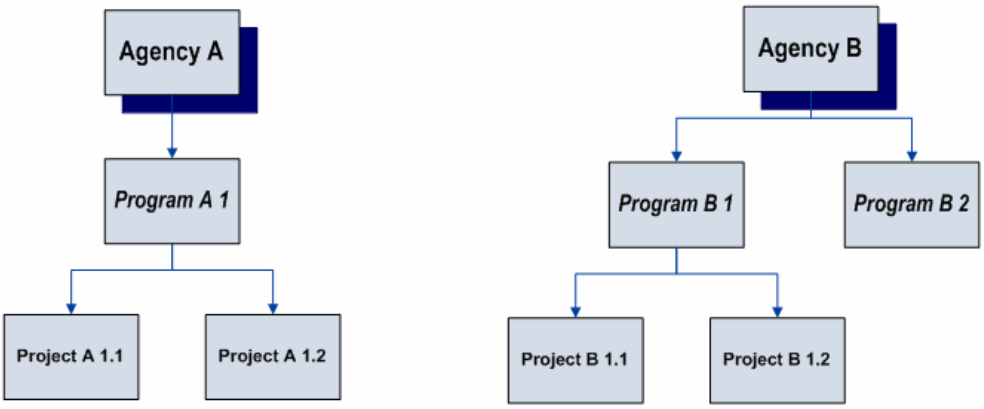

Figure 102: Decentralized Structures

Centralized Structures (Figure 103)

- Can provide easier aggregate reporting for large or multi-county installations of ServicePoint.
- Assignment of System Administrator I or Agency Administrator can support Providers down the "tree" without explicitly assigning special permissions settings.
- Licenses can be maintained from a single point.

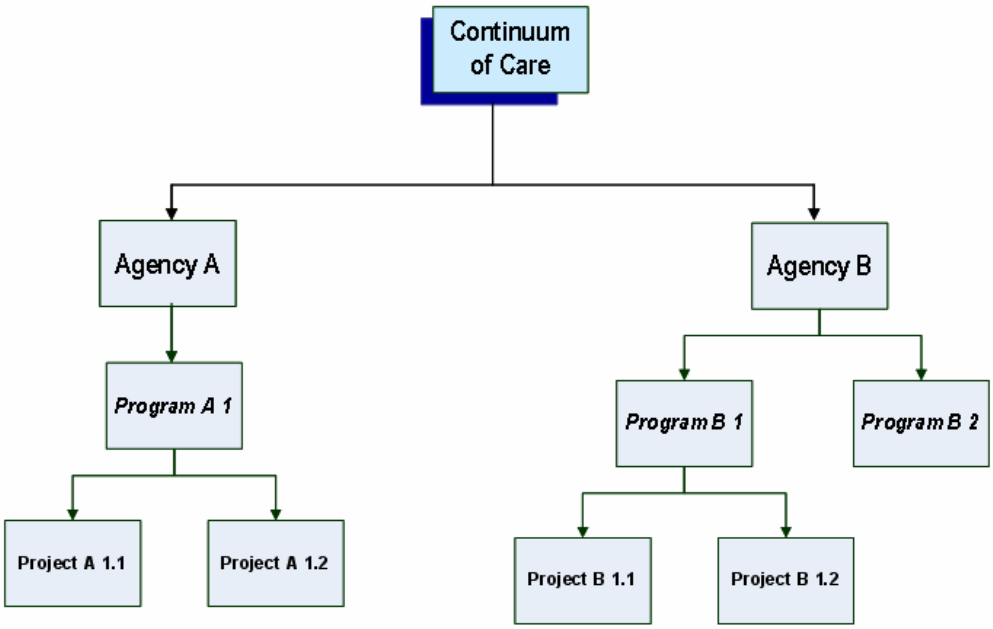

Figure 103: Centralized Provider Structure

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Understand Where to Store Client Information

A key factor when determining the Provider structure is to know that Client data is collected and stored at each Provider. That is to say, each Provider is essentially a designated place in the database where information is stored. In addition to the explicit security settings established for each Provider's data by either Agency or System Administrators, there are some implicit security rules that are inherent in the position of the Provider within the Provider structure. Please see the *Golden Rules of Security* section later in this chapter for more details. Simply note at this point, the lower level in the Provider structure that the data is entered, the more secure the data will be.

Documenting Your Planned ServicePoint Environment

Once the decision is made as to the general issues related to how a Provider structure will look, it is highly recommended that the Administrator document all the Providers and Users that are to be created in ServicePoint. A diagram is always a good idea. Listed in the Appendix are worksheets that can assist with this task and help in keeping track of what information will be included in configuring ServicePoint to meet your needs.

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BUILDING A PROVIDER STRCTURE

VIEWING EXISTING PROVIDERS

Selecting the **Admin Provider** hyperlink within the **Admin** page will display a list of the Providers within your environment (Figure 104). Although its appearance is similar to the selection of **ALL** within ResourcePoint, the **Admin Provider** hyperlink is used to create, configure, and edit Providers within your ServicePoint community.

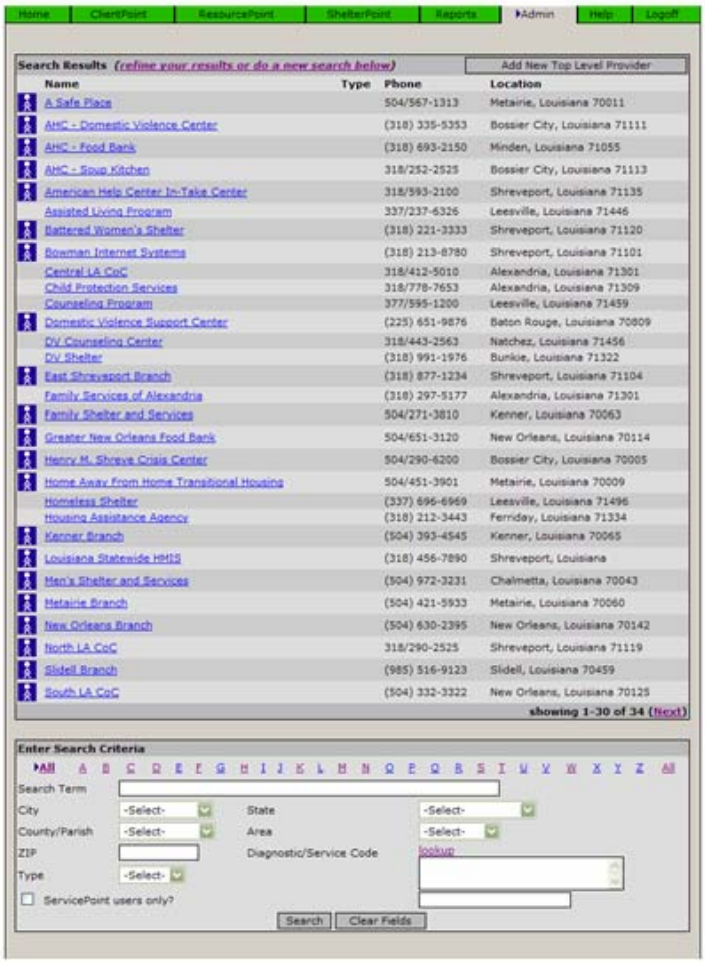

Figure 104: Admin Provider Listing

To create a **Level 1** Provider, select the **Add New Top Level Provider** button in the upper right-hand portion of the screen. Level 2 Providers and below are all Child Providers of another Provider, therefore the Parent Provider must be created before children Providers can be created.

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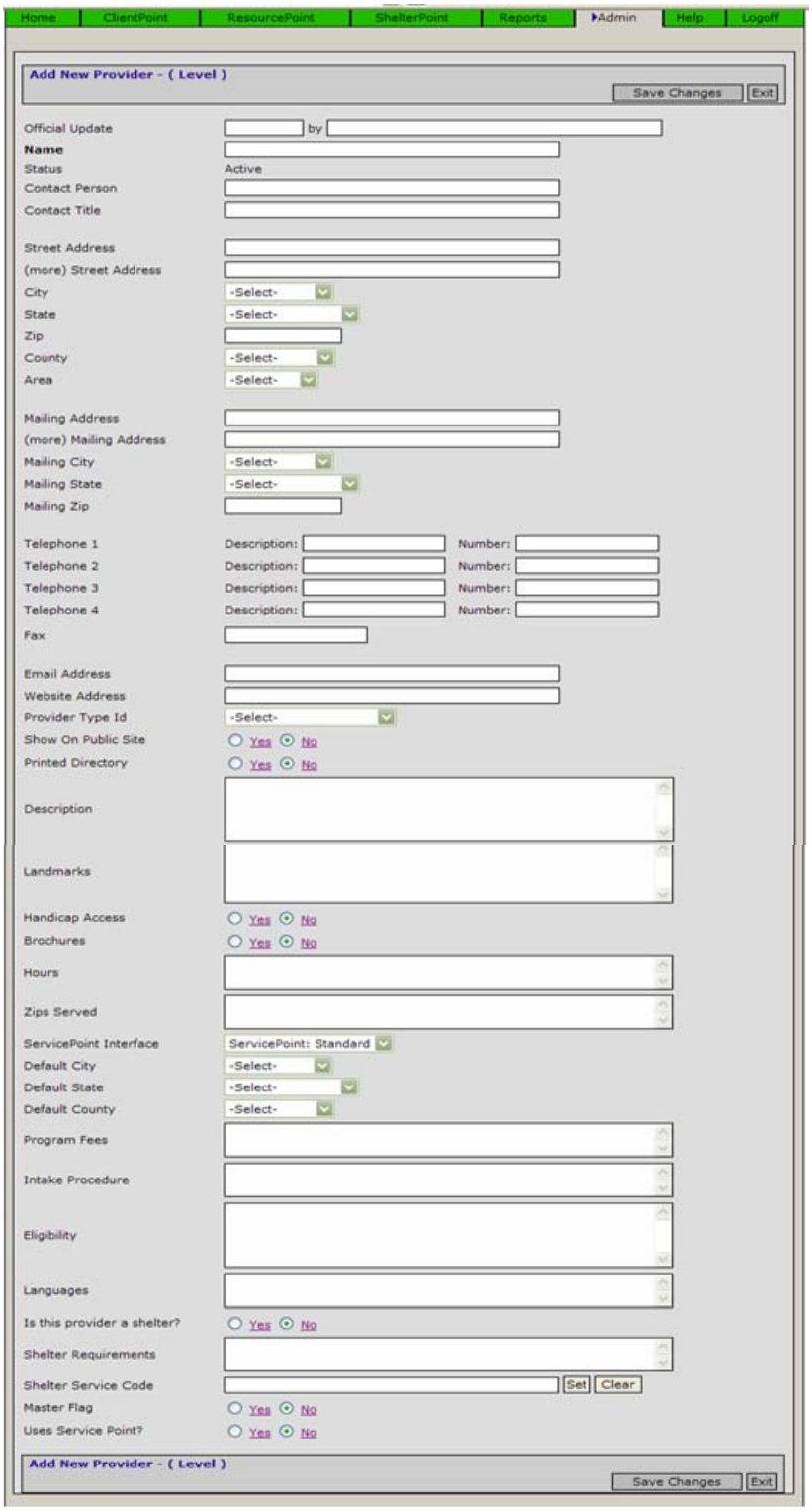

Figure 105: American Help Center - Intake Provider (Middle Portion of Page)

Definitions to fields within a Provider Profile are listed in Appendix C. Once completed and the information has been saved using the **Save** Changes button, the screen expands for additional

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Provider configuration. In Figure 106 below, information about the American Help Center Provider is shown.

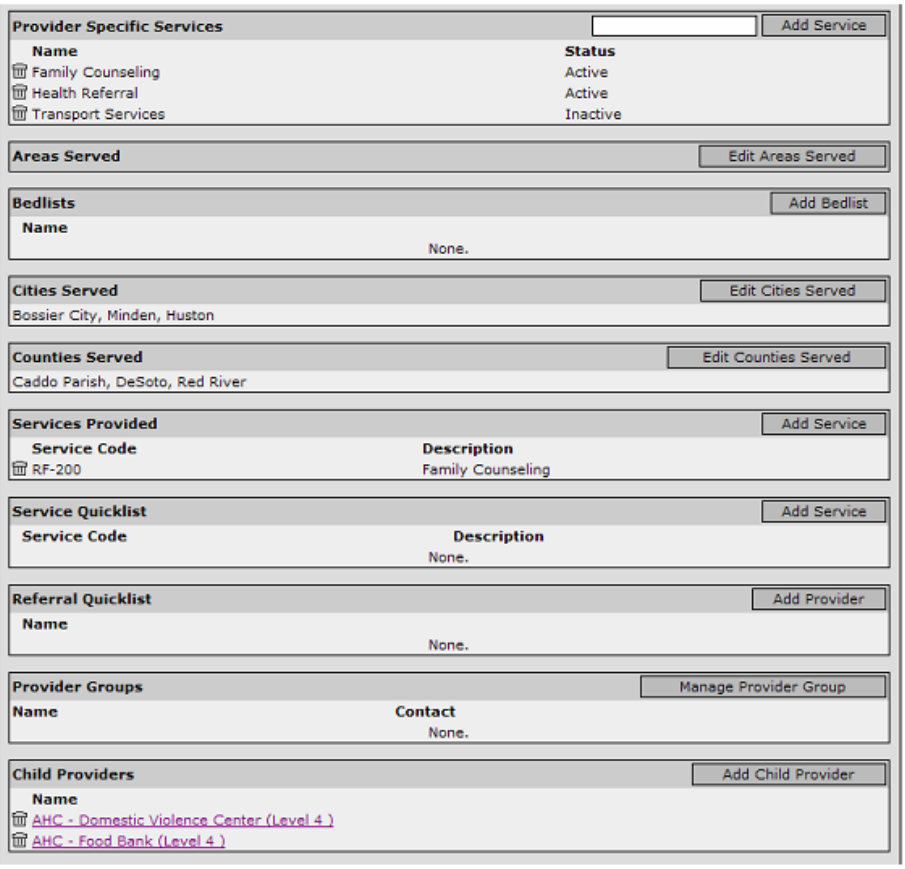

Figure 106: American Help Center - Intake Provider (Middle Portion of Page)

The **Provider Specific Services** section is used to define specific Services a Provider offers using non-Code Set terms. This section allows Administrators to create fields for reporting on Services without being limited by Code Set terms. See the section on **Service Transaction**s in Chapter 4 for more detailed information on the use of Provider Specific Services.

The Areas Served section permits using regions to describe the areas a Provider serves. For example, one Provider may cover the North and Northwest regions of a city or state while another Provider offering similar services would cover the South and Southwest regions. Areas are defined in the *Areas Picklist*.

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Creating Bedlists for a Shelter

A bedlist is a list of available beds within a shelter. A Provider designated as a Shelter can have multiple bedlists, depending on how the agency has organized the management of its beds. For example, a shelter may have a bedlist for men and another for women. (Figure 107)

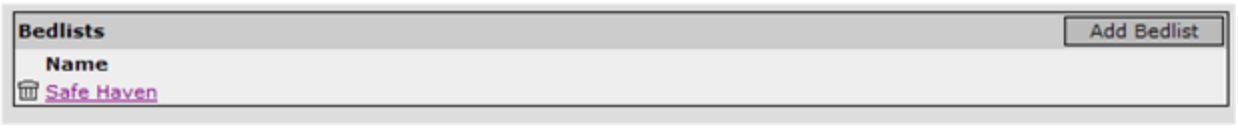

Figure 107: Battered Women's Shelter Bedlist

To create a bedlist, the System Administrator should click the **Add Bedlist** button to display a blank **Bedlist Data** screen (Figure 108). Within this screen is the name of the bedlist ❶ and the shelter type ❷.

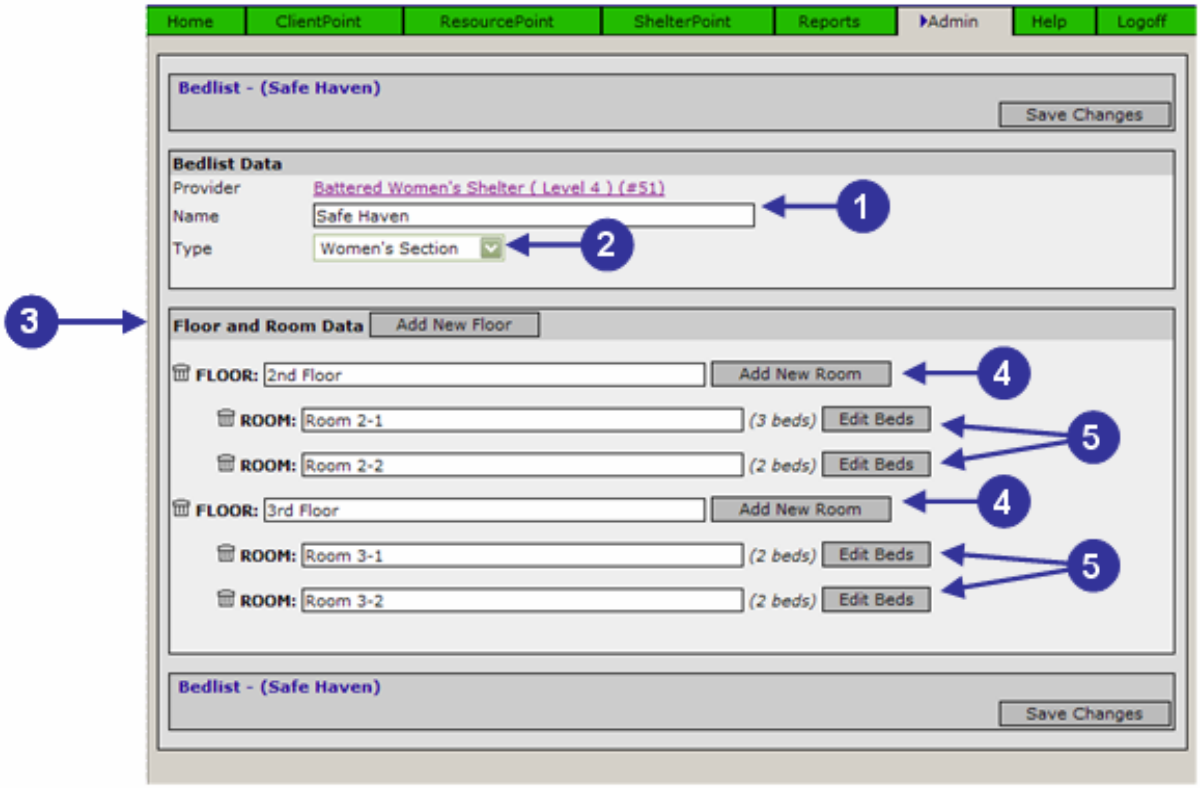

Figure 108: Completed Bedlist

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Once the initial Bedlist screen is saved, the page expands to display additional bedlist configuration items including adding a new floor (default name *New Floor*) ❸, adding a room to a floor (default name *New Room*) ❹ or adding beds to a room ❺ (default name *New Bed*).

The Edit Bed button is used to add or edit beds within a room. It displays a screen in which the User enters the number of beds to be added for each room shown in the **Room Data** section at the top of the page. (Figure 109)

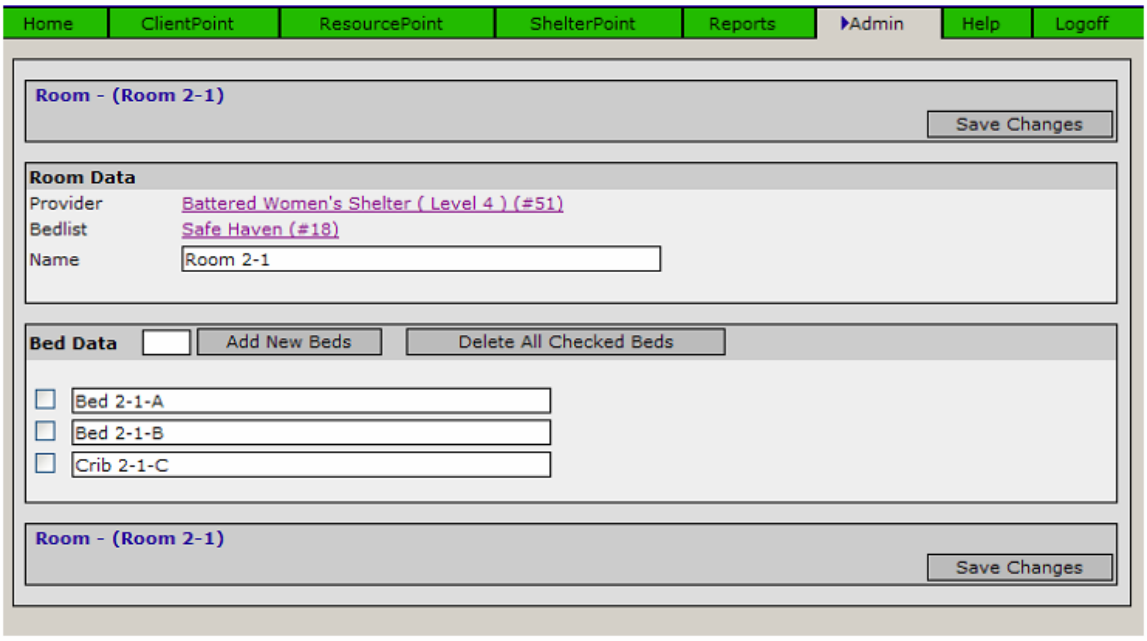

Figure 109: Edit Bedlist Screen

Each newly added item can be renamed but consideration should be given to naming conventions so that the appearance of the list is organized. For example, if you add under 100 beds, use 01, 02, etc. for one digit numbers. If you are planning to add 100 or more beds, use 001, 002, 010, 011, etc for one and two digit numbers respectively.

When deleting a floor using the Delete icon, all associated rooms and beds will also be deleted. Removing a room will also remove all associated beds.

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ADDITIONAL SERVICE RELATED SECTIONS

The *Cities Served and Counties Served* sections allow Administrators to define the cities and counties that are served by the Provider. The *Services Provided* section uses Code Set terms to identify the Services that a Provider offers. The terms placed in this section serve as search terms in the ResourcePoint search engine.

Services Quicklist and **Referral Quicklist** populate a dropdown list to speed up data entry for End Users when defining NEEDS and SERVICES and when creating REFERRALS.

Modifying Provider information can be performed easily by accessing the appropriate Provider profile, making the change, and saving the profile.

ADDING CHILD PROVIDERS

As mentioned earlier, the highest level of any Provider structure is the Parent Provider. The Child Provider section is used to add an entity's programs or other related but separate Services offered by the entity. Adding a child Provider is performed in the same way as a top-level Provider. The only difference is that a hyperlink to its parent and the level of the Provider is automatically included at the top of the profile.

PROVIDER AND DATA SECURITY

GOLDEN RULES OF DATA SECURITY

Protecting Client data from unauthorized access actually includes many several levels of security. When setting up a ServicePoint system, an Administrator should be aware of three data security rules. These rules within ServicePoint are called the "**Golden Rules of Data Security**". They dictate what can and cannot be hidden depending upon the parent-child relationship (see the Provider Parent and Child Relationships in Chapter 1).

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GOLDEN RULES OF DATA SECURITY:

- Parents CANNOT hide from their children.
- Children CAN hide from their parents.
- Siblings CAN hide from one another.
- Using Figure 110, the Golden Rules of Data Security apples as follows:
  - Since Provider 4 is the parent of Providers 7, 8, and 9 and its data *cannot* be hidden from its children (Providers 7, 8, or 9).
  - Since Providers 7, 8, and 9 are children of Provider 4 their data *can* be hidden from Provider 4.
  - Since Providers 3, 4, 5 and 6 are "siblings," their data can be hidden from any or all of each other.

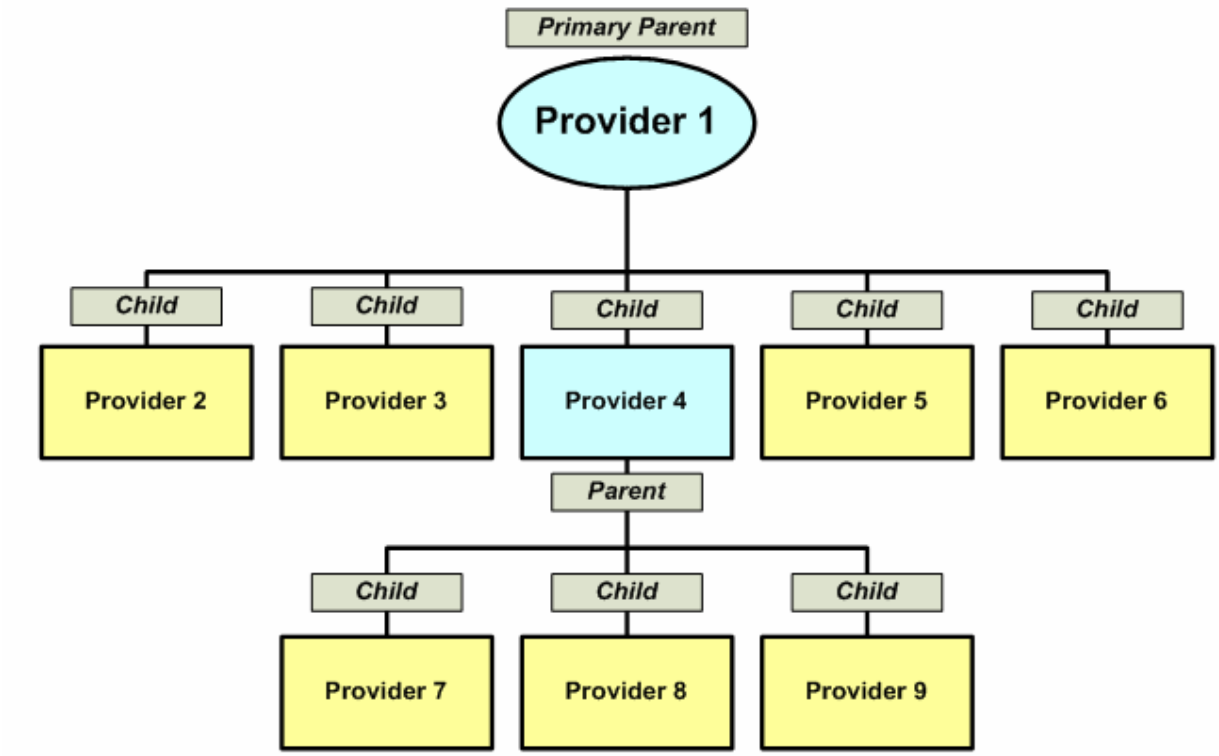

Figure 110: Sample Provider Structure

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ELEMENTS OF DATA SECURITY

There are several levels of security within ServicePoint. These levels permit flexibility in configuring data access within a Provider structure. Considerations related to elements involved with securing information stored by a Provider include:

- Provider Structure
- Release of Information (ROI)
- User Access Level
- User's Special Permissions
- Default Security Settings
- Security Settings within Client Files

The combination of these security elements dictates whether data is accessible to the User.

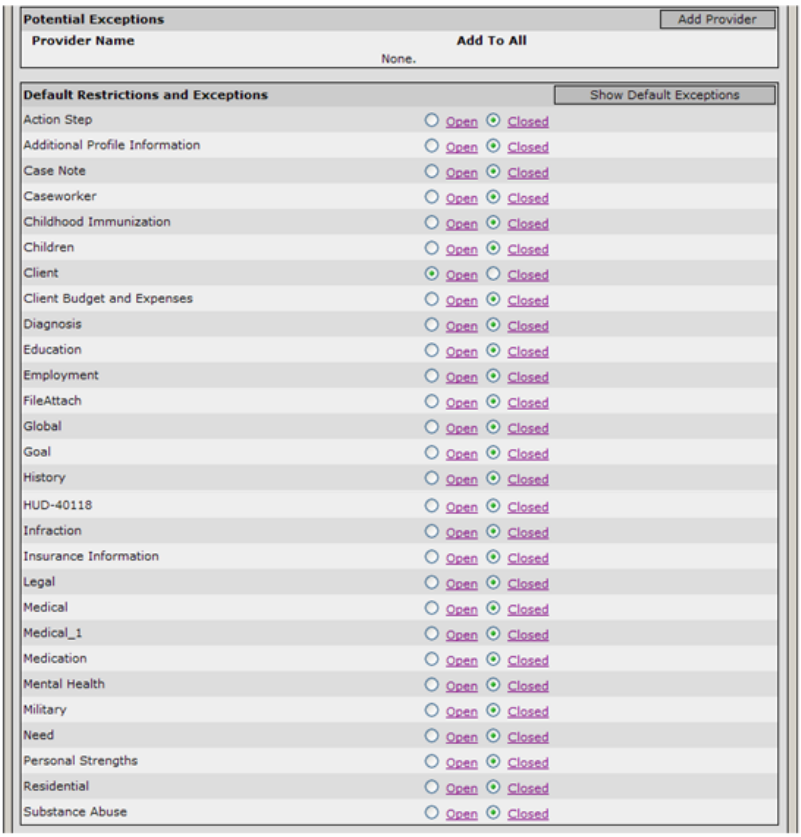

Figure 111: Provider Default Restrictions and Exceptions Section

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DEFAULT RESTRICTIONS AND EXCEPTIONS

The **Default Restrictions and Exceptions** section on each *Admin Provider Profile* screen allows Administrators to determine the default security settings for a Provider. Each line item in this section represents a piece of Client data, from Assessments to Action Steps to Caseworkers. The restrictions on each of these line items is either **Open** or **Closed**. If set to **Open,** then every User in your instance of ServicePoint will be able to see that element of the Client's record (if the data is entered during an active ROI). The primary view of this section displays the **Default Restrictions**. (Figure 112)

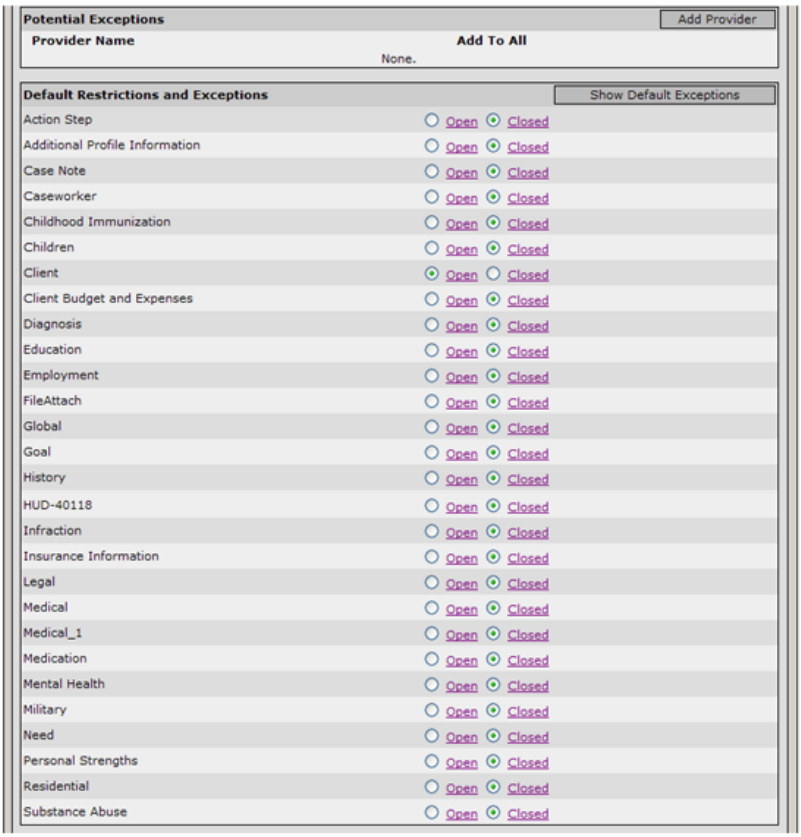

Figure 112: Provider Default Restrictions and Exceptions Section

However, sometimes it is necessary to keep some Client data closed from most, but not all Providers. ServicePoint has the ability to set **Exceptions** to the established **Restrictions**. For example, suppose Provider A wants to share the data collected in an Assessment for all Clients it serves with Provider B, but does not want to share that data with any other Provider. Provider A should set the **Default Restriction** for that Assessment to **Closed** with Provider B listed as a **Closed Exception**.

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To do this, Provider B must be listed as a *Potential Exception* in the section directly above the **Default Restrictions and Exceptions** section. Clicking the **Add Provider** button will open a popup window that displays all the Providers in the site. Simply clicking on the name of the desired Provider will set it as a *Potential Exception*. The Administrator can now apply that Provider as an actual Exception to any or all of the line items of Client data.

Clicking on the **Show Exceptions** button will change the view of this section of the screen to display a column for **Open** line items and a column for **Closed** line items. The applied **Exceptions** for each line item are also displayed in this view. The **Restrictions** can be altered from this view if necessary. Simply by clicking on the **Add New Exception** button will allow Administrators to apply *Potential Exceptions* as actual, or applied, **Exceptions** to the rule, or **Restriction**, governing the associated line item.

For example, in the Figure below, the **Default Restriction** on the line item "**Action Step**" is **Closed**. However, two Providers are listed as **Exceptions** to this **Closed** rule. This means that any information related to Action Steps for any Client served by this Provider will only be viewable by Users at this Provider, any of its Child Providers (see the first Golden Rule of Data Security), and Users at the AHC - Domestic Violence Center and Teen Pregnancy Counseling Services. (Figure 113)

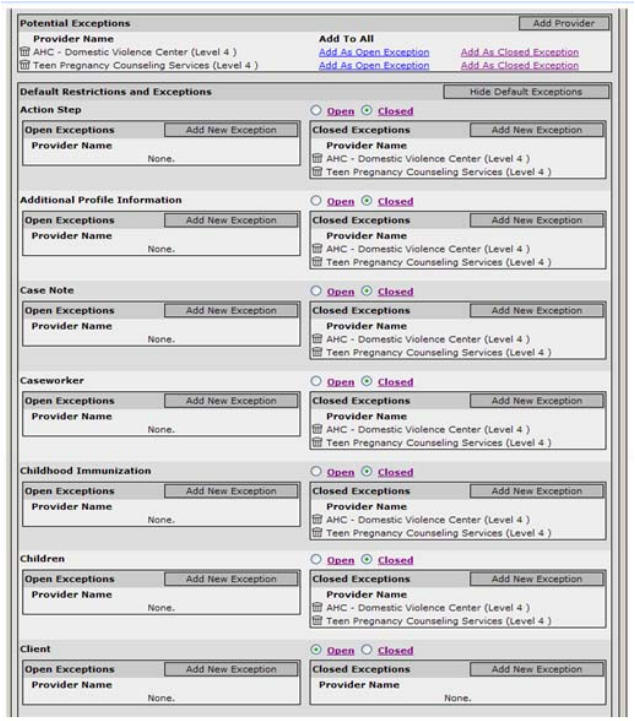

Figure 113: Default Exceptions and Restrictions with Potential Providers Exceptions

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The line item **Client** *in the* **Default Restrictions and Exceptions** *section of the* Admin Provider Profile *screen refers to the Client's First Name, Last Name, SSN, and Household information. The Default Restriction for this line item is independent of the ROI - no ROI is necessary to activate the* **Default Restrictions and Exceptions** *for this line item.*

REMOVING SERVICE PROVIDERS

Deleting a Provider will also delete all Users attached to that Provider. Please do not delete Providers unless absolutely necessary. Although the information will be accessible directly from the database, retrieving the information in this manner is a chargeable item by Bowman Systems' Operations Team. Client data will remain accessible if it had been shared with other Providers.

SERVICEPOINT ASSESSMENTS

Although ServicePoint includes a number of built-in assessments, Administrators may need to redesign an assessment or create custom assessments for your community. This task can be performed through the **Assessment Admin** hyperlink within the Admin Module.

The Assessment Admin screen has two distinct sections: the *Category* section ❶ and the *Assessment* section ❷. A *Category* is a group of questions all related to a particular topic. An *Assessment* is a questionnaire consisting of questions selected from one or more categories that can be made available to any or all Providers to use. (Figure 114 below)

A Picklist ❸ at the top of the *Category* section can be accessed to view all existing *Categories*. New *Categories* can be added by System Administrators if necessary ❹. Selecting a *Category* from this dropdown list will display questions associated with the selected *Category* that are **not** included in the *Assessment* being viewed below. Or, new questions can be added to an existing *Category* ❺.

All existing *Assessments* can be accessed from a Picklist in the Assessment section of the screen ❻. New *Assessments* can be added into the system if necessary ❼.

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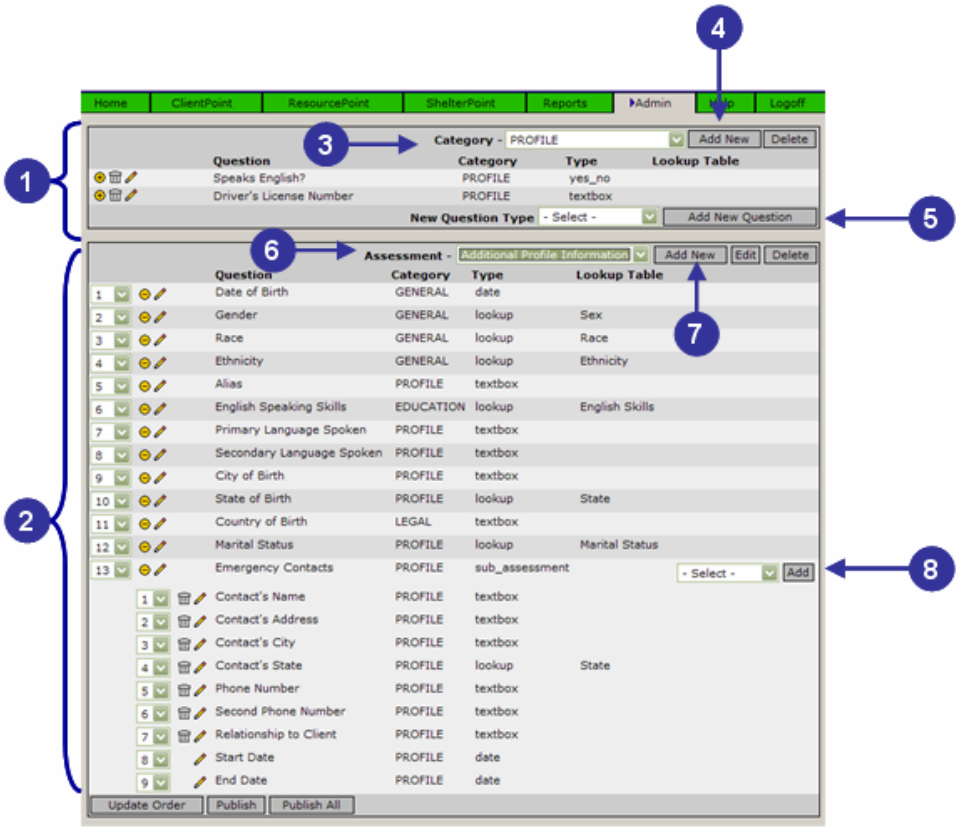

Figure 114: Assessment Screen

For detailed instructions on how to add new questions or to create custom Assessments, please see the HelpFile -> Aministration -> Assessment Admin.

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QUESTION TYPES

The format of an answer to an assessment question is determined by the question type.

QUESTION TYPE	DESCRIPTION
Label	Allows the creation of a divider on the Assessment Page. It does not collect or hold data. This serves as a "header" within an Assessment.
Int (Integer)	A field that stores only numbers. Used for input of whole numbers.
Textbox	Allows entry of one line of text. Box size is determined by the Administrator.
Textarea	Allows for entry of multiple lines of text.
Date	Allows entry of a date in one of two formats: mm/dd/yyyy or m/d/yyyy
Lookup	Create a Picklist or a dropdown box. Once created, the Picklist Data option on the Admin Main Page must be used to add items to be selected.
Yes/No	Creates a Picklist with Yes and No as the only options.
Sub-Assessment	Allows Users to collect multiple answers to a series of related questions that may change over time, i.e. Emergency Contacts. Questions are added to the subassessment only after the subassessment has been added to an assessment (see below) ❽.
Service Code	Creates a question that allows Users to access Code Sets.

Table 9: Question Types

Adding a New Question

The **Add New Question** button initiates the display of the **Add Question To Assessment** screen. This screen is used to configure the questions based on the question type selected.

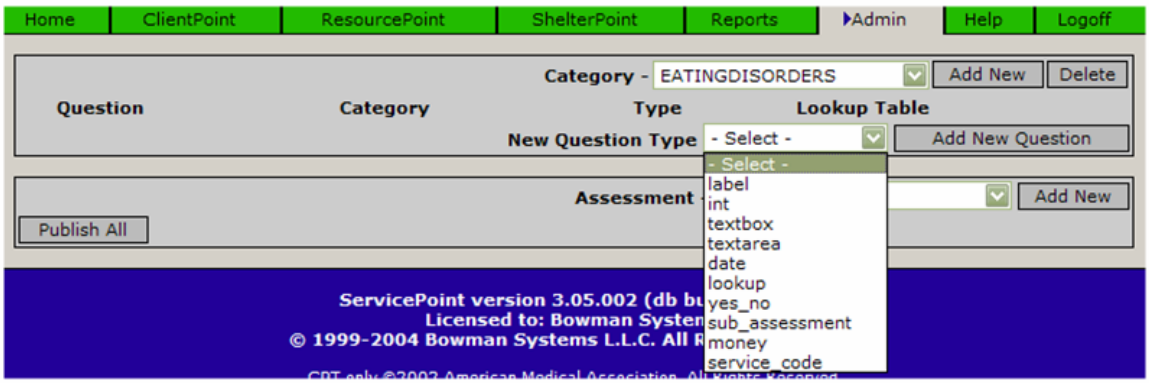

Figure 115: New Category for Eating Disorders with Question Type choices

The fields that will display depend on the question **type** being created.

NEW QUESTION FIELDS	DESCRIPTION
Label	The text of the question the User sees.
Question Code	The system assigned question ID number
Description/Help	If the User clicks on the label for this question, a popup window will provide a description of the question.
Category	The category this question will be associated with.
Minimum Access Level	Indicates the User roles that will be able to view this field. The default is to have the field open to all access levels.
Box Size*	Expressed in the number of characters, this field defines the length of an entry box.
Max Input Characters*	Allows the creator to enter the maximum allowed characters for this field (the system allows a maximum of 50 characters)
Minimum Value*	Allows the creator to specify for Int and Money question types the lowest numeric value to be entered. If the User enters a value lower than the minimum, a popup alert appears.
Max Value*	Allows the creator to specify for Int and Money question types the maximum numeric value allows. If the User enters a value higher than the maximum, a popup alert appears.
Number of Rows*	The rows of text displayed within a Textarea only field for the answer
Number of Columns*	Specifies the length of the entry box within a Textarea as expressed in number of characters
Lookup Table*	Allows the creation of a picklist and appears as a dropdown box. Choices to be selected are listed in the PickList Data section accessed through the Admin Main Page.

Table 10: New Question Fields (*Appearance depending on question type)

REDESIGNING EXISTING ASSESSMENTS

Redesigning an existing assessment involves the addition of existing questions from a category, removal of questions from an existing assessment or revision of questions that is part of a category and assessment.

For detailed instructions on how to add new questions or to create custom Assessments, please see the HelpFile -> Aministration -> Assessment Admin.

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Adding/Remove Questions to an Existing Assessment

Adding questions to and removing questions from the currently viewed Assessment is performed by either:

- Pressing the **Add Question** icon (⊕)
- Pressing **Remove Question** icon (⊖)

If adding a question, the selected question will be moved to the bottom of the *Assessment* section of the screen. Removing a question will return the question back to its *Category* and will be displayed in the *Category* section at the top of the page, if that *Category* is selected from the list.

Changing Assessment Questions Order

The order in which questions are displayed can be altered by selecting a number using the dropdown list beside the question in the Assessment. Upon selection, all questions following the number selected are automatically renumbered.

Modify Existing Assessment Questions

The **Edit** icon (✎) is used to modify a question. This icon is available for questions of a Category and for questions that are part of an Assessment. This option will allow System Administrators to change the question's label, associate the question with a different Category, change answer format parameters for the question (e.g. change the size of a text area or textbox), and alter the format of the question label (e.g. change color, bold, italicize, or underline).

Publishing An Assessment

Newly created Assessments or modified Assessments must be published to the system in order to be accessed by Users. To do this, click the **Publish** button at the bottom left-hand side of the page. ServicePoint will search for any changes made to the displayed Assessment and will "publish" them, essentially activating the changes.

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If a System Administrator has made changes to several Assessments without clicking the **Publish** button, it will be necessary to click the **Publish All** button to activate the changes. This will prompt ServicePoint to search all Assessments for any changes made since the last **Publish**. This process may take a while to complete.

Requiring System Administrators to **Publish** his/her changes allows the ability to begin working on new or existing Assessments in one session and finishing his/her work during another session.

Provider Access to Assessments

As mentioned at the beginning of this course, access to Assessments is on a Provider-by-Provider basis. The System Administrator must define which Providers will have access to each Assessment. This is accomplished by using the **Edit** button within the Assessment Section. Clicking the name of a Provider will select one Provider. Clicking the names of Providers while holding down the **Control** key will select multiple Providers who will be given access to this assessment. Once the desired Providers are selected be sure to **Save** your selection.

For detailed instructions giving Providers access to an Assessment, please see the Assessment Admin Feature Tech Note. *You can find this document through the Self Service Portal by searching with keyword "assessment."*

ASSESSMENT ADMINISTRATION

Although a Provider may have access to an Assessment, the System or Agency Administrator may need to perform additional configuration. This includes determining:

- What order the Assessments are to be displayed in the Assessment List (**Order**)
- Which Assessments are to be displayed in the Assessment List (**Visible**)
- Which Assessment is to be shown as the default selection within the Assessment List (**Default**)
- Which Assessment is to be included as part of the Client Profile page (**Show On Profile**)
- Which Assessment is to be display upon entering a Client into a program (**Show On Entry**)
- Which Assessment is to be displayed upon exiting a Client from a program (**Show On Exit**)

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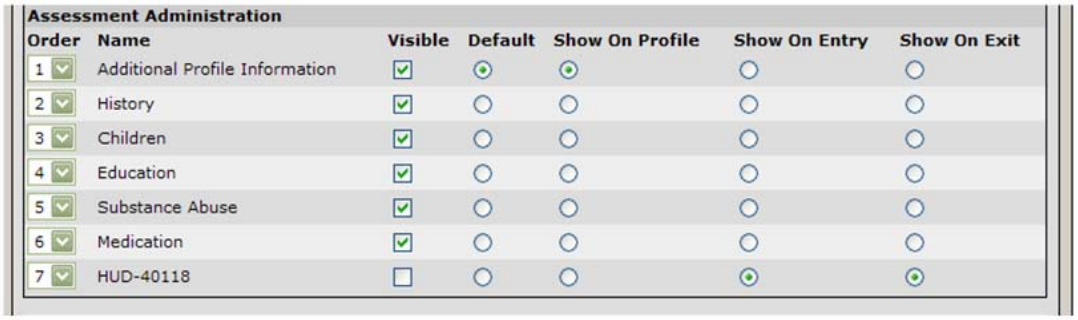

Figure 116: Assessment Administration within the Provider Profile

If your organization is dependent on HUD reporting requirements, it is highly recommend that the HUD 40118 Assessment be configured to display upon entry to and exit from a program.

USER ADMINISTRATION

Determining which Provider to "attach" a User is vitally important for both storing Client data in the correct place in the database and for maintaining proper security of Client data. The User's Default Provider is the "bucket" in which all Client data entered by that User will be collected. Remember, security settings (**Default Restrictions and Exceptions**) are applied to each Provider.

USER ROLES

It is advisable to take time to consider the access level assigned to each User. The capabilities of each role within ServicePoint are defined in Appendix A and Appendix B. These documents are designed to help System Administrators understand the full ramifications of what a User will or will not be able to do. A User Configuration Worksheets is also included (Appendix F) to help organize the necessary steps in creating a User within ServicePoint.

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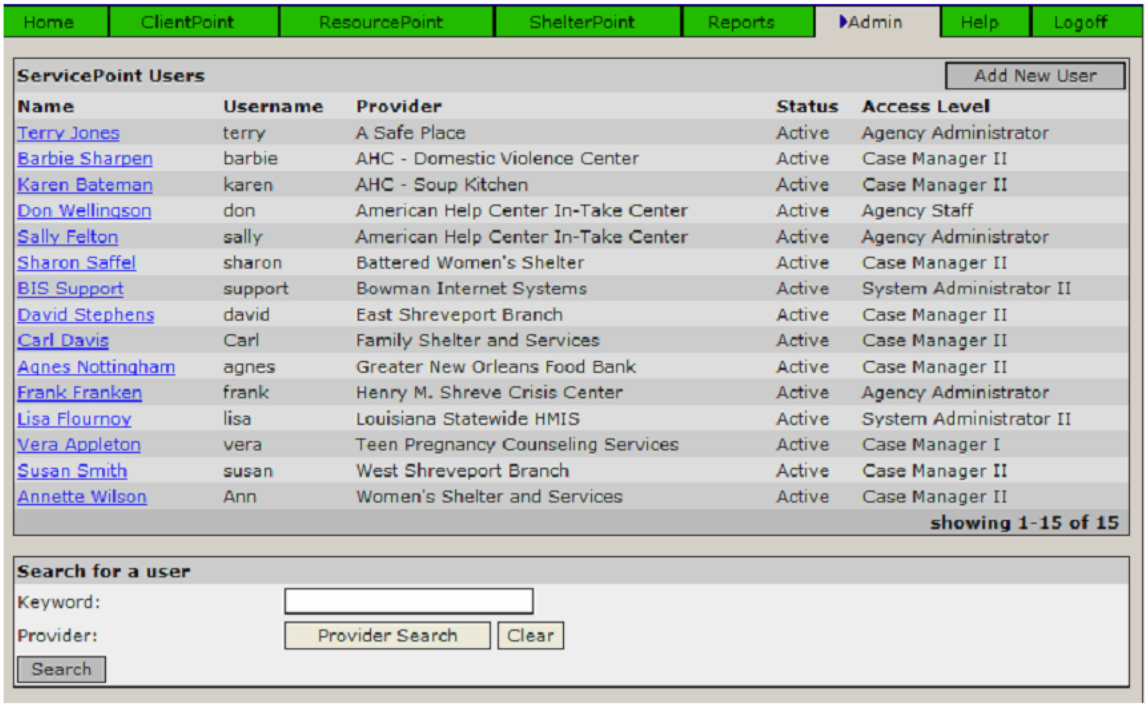

Figure 117 ServicePoint User Listing Page

USER DEFAULT PROVIDERS

A User's Default Provider cannot be changed once it has been saved. If an Administrator sets the wrong Provider as the User's Default Provider, that User account will need to be deleted and a new account will need to be created.

Typically, System Administrator IIs are assigned to the only Level 1 Provider in a "centralized" or "True Hierarchical Provider Structure", though a System Administrator II's access remains the same no matter where in the Provider structure he/she is attached. System Administrator Is, Agency Administrators, Executive Directors and System Operators should always be assigned to the top level of the Provider (agency) they will manage, whether in the centralized or decentralized structure. Agency Administrators can create Users at any Provider below his/her Default Provider. They are not able to attach Users to any of their sibling Providers.

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VIEW AND MODIFY AN EXISTING USER

The User hyperlink is access from the Admin module and displays a list of current Users. This screen permits the searching of the ServicePoint system for existing users that can be selected for modification.

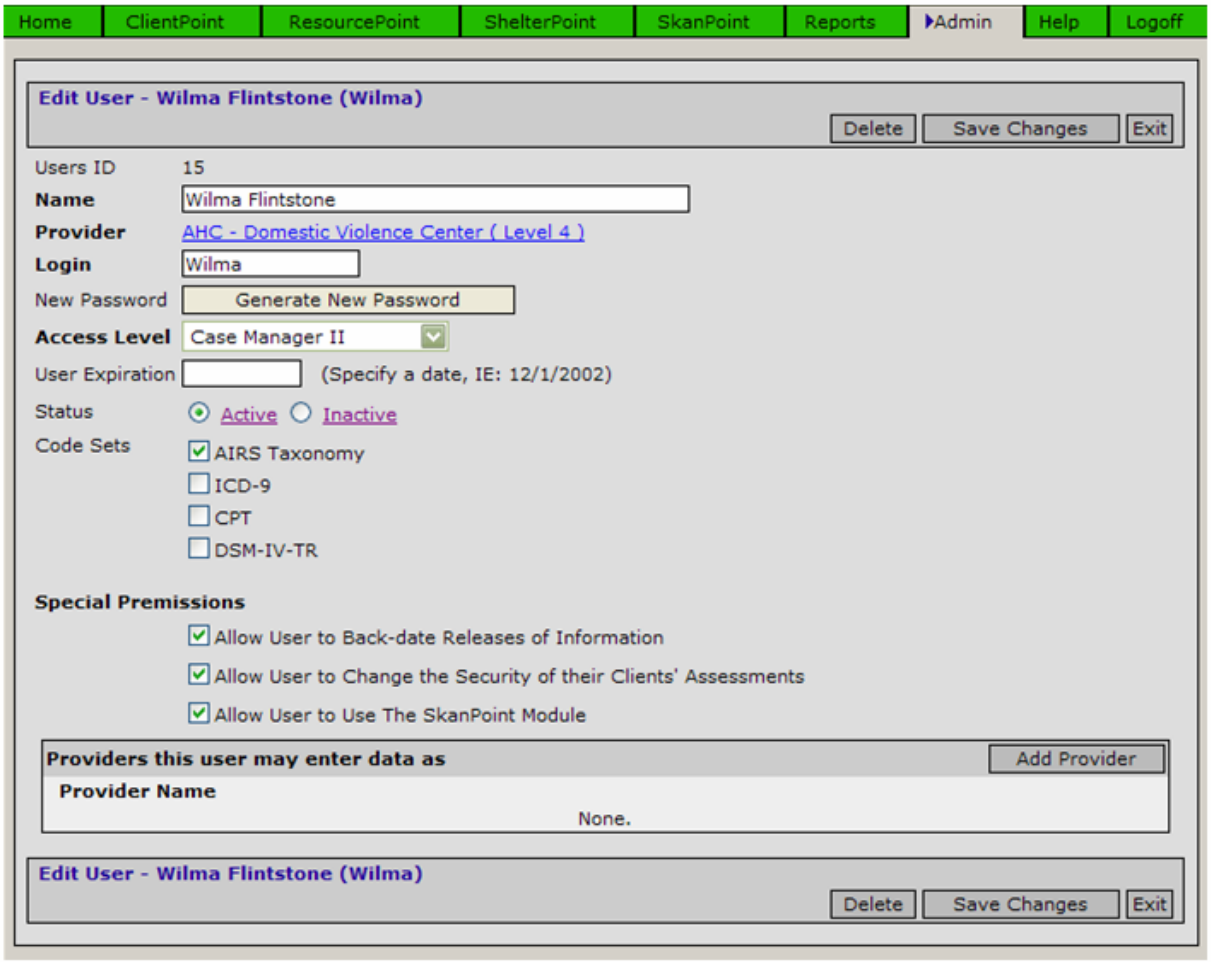

Figure 118: Edit User Account Screen

To change the configuration of an existing user, simply select the hyperlink representing the User's name. This will display the *Edit User* screen for that User (Figure 118). Fields within this page include:

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USER ACCOUNT FIELD NAME	DESCRIPTION
User ID	The ID number assigned to the User by ServicePoint. Visible once user account has been saved.
Name	The full name of the User.
Provider	The User's Default Provider.
Login	The name to be used to log into ServicePoint.
Password	This is a temporary password used for initial login. Once the User has logged in, he/she will be prompted to change his/her password to something only he/she knows. System and Agency Administrators can generate new passwords if the User does not remember his /her self-defined password. No passwords are stored in the ServicePoint application.
Access Level	The role assigned to the User.
User Expiration	The date the account is to be tagged to expire. Used to temporarily assign an account, i.e. for volunteers.
Status	Used to disable an account without deleted it. If a User fails to login correctly four consecutive times, his/her account will be set to "Inactive."
Code Sets	The Code Sets to be used by this User. Additional charges may apply depending on the Code Sets selected. AIRS taxonomy is provided as part of a ServicePoint installation.
Special Permissions	**Allow user to Backdate Release of Information** will allow or prohibit users from changing the ROI date from the current date. **Allow Users to change the Security of their Client Assessment** will allow or prohibit a User from changing the security setting of their Client's Assessments from the Provider's Default Restrictions and Exceptions. **Allow User to use the SkanPoint Module** is visible only if SkanPoint has been selected in System Preferences. If this box is selected, the SkanPoint Module will be visible in the Navigation Bar. Also, the capability to select a Client record by the Client ID number and the capability to create individual Client ID cards is made available for that User.
Providers this user may enter data as	Gives the User permission to add data for other Providers that have been added here.

Table 11: User Account Fields

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CREATING A NEW USER

Creating a User is performed by selecting the Add User button on the User Search Page. This will display an empty user account page for configuration (Figure 119). With the exception of the **User ID** and the **Providers this user may enter data** as, all other fields described above are visible. Once the User account information has been saved, the **User ID** and the **Providers this user may enter data** fields will become visible. In addition, the password for new users is displayed once and will not be visible once the **Save Changes** button is selected.

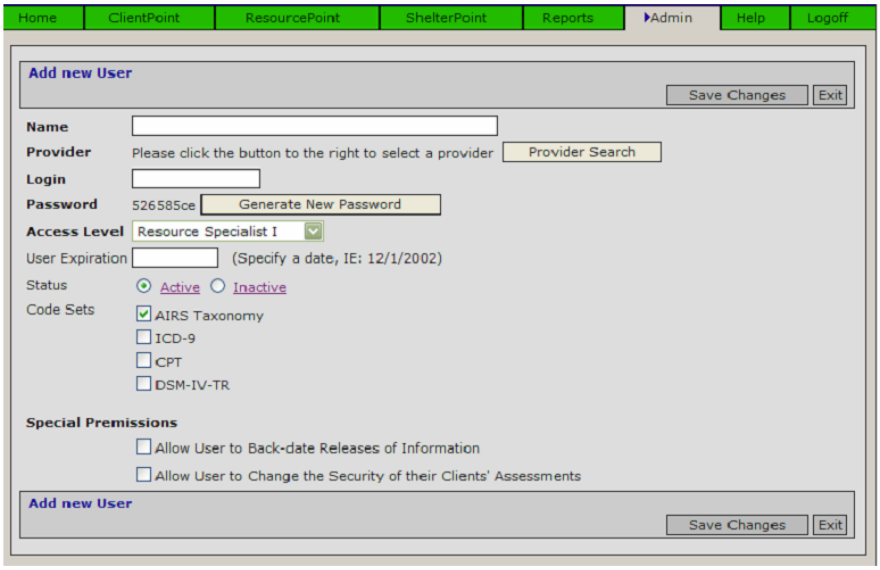

Figure 119: Add New User Page

Be sure to record the password assigned prior to Saving. Once created, Administrators can only generate new passwords.

RESETTING USER PASSWORDS AND STATUS

On occasion, a User either will forget their password or will enter the wrong password causing ServicePoint to disable their account.

- If a password is forgotten, the Administrator uses the **Generate New Password** button to display a new password.
- If the wrong password is entered in error more than 4 times consecutively, the account will be tagged as '**Inactive**'. Clicking the '**Active**' Status button will reactivate the account. Generating a new password may be necessary.

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IN SUMMARY …

- The Admin Module is accessible only to users with administrative roles.
- Agency Administrators can only add and configure Providers in or beneath their default Provider and users within their default Provider structure.
- Agency Administrators can update Agency NewsFlash; System Administrators can update system or Agency NewFlash areas.
- Shadow Mode is a troubleshooting tool that mimics a User's ServicePoint environment. It is not to be used for data entry purposes.
- Picklist is a customizable feature that makes data entry easier using dropdown list while providing data entry consistency.
- System preferences control the poverty rate, poverty multiplier, case note editing capabilities and SkanPoint availability on a system-wide level.
- User licensing is allocated by Provider with the ability to order additional licenses as needed.
- A Provider structure varies from one ServicePoint installation to another and can be set up in a centralized or decentralized fashion.
- Admin Providers is a feature that is used to view and modify existing Providers or to create and configure new Providers.
- A bedlist is created within a Provider's profile and is used to organize floors, rooms and beds within a room.
- Data security is managed using the Golden Rules of Data Security: Parents cannot hide from their children; Children can hide from their parents; Siblings can hide from one another.
- Data security takes into consideration several elements in the sharing or hiding of Client information. They are:
  - How the Provider structure is built;
  - Whether ROIs are used and if permission to share has been granted or denied;
  - The access level of the User viewing the data;
  - The permissions of the User to enter or edit Client data for a Provider;

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- The default settings of the Provider;
- Security settings made by the User.

- Default settings can be established for a Provider allowing exceptions on a per Provider basis.
- User Roles control what a user can access within ServicePoint and are associated with a default Provider.
- Once created, a User cannot be moved to another Provider but can be configured to enter data for other Providers within the structure.
- The User hyperlink is used to create and edit User accounts.
- User accounts can be Active or Inactive and can be configured to be disabled on a specified date.
- Users must be given permission to use Service code sets, SkanPoint, perform backdating and to change security of a Client's Assessments.
- User passwords cannot be seen by the Administrator but can be re-generated.

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APPENDIX

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APPENDIX A - USER ROLE DESCRIPTIONS

Resource Specialist I	Access is limited to the ResourcePoint module. This role allows the User to search the database of area agencies and programs and view the detail screens for each agency or program. Access to Client or Service records is not given. A Resource Specialist cannot modify or delete data.
Resource Specialist II	The same access rights as Resource Specialist I. In addition, this person is considered an agency-level I&R Specialist with the ability to update their own Provider information.
Resource Specialist III	The same access rights as Resource Specialist II. In addition, this person is a system-wide I&R Specialist with the ability to update any Provider information. This access level can also edit the system-wide news.
Volunteer	Access to ResourcePoint module is limited access to viewing Provider information. Access to ClientPoint is limited to accessing Client Service records. A volunteer can view or edit basic demographic information about Clients but is restricted from viewing detail assessments. This role is permitted to enter new Client records, make Referrals or check-in and checkout a Client from a shelter. Normally, this access level allows a volunteer to complete the intake and then refer the Client to an Agency Staff or Case Manager.
Agency Staff	Agency staff has access to ResourcePoint, has limited access to ClientPoint, full access to Service records and access to most functions in ServicePoint. However, Agency Staff can only access basic demographic data on Clients. All other screens are restricted, including assessments and case plan records. They have full access to Service records. There is no reporting access.
Case Manager I	Case Managers have access to all features excluding administrative functions. They have access to all screens within ClientPoint, including the assessments and full access to Service records. There is full reporting access with the exception of audit reports.
Case Manager II	The same access rights as Case Manager I.

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Agency Administrator	Agency Administrators has access to all features including agency-level administration functions. This level can add or remove users from their Provider and edit their Provider data. They have full reporting access. Agency Administrators cannot access the following administrative functions: Assessment Administration, Picklist Data, Licenses, Shadow Mode or System Preferences.
Executive Director	The Executive Director has the same access rights as the Agency Administrator, but is ranked above the Agency Administrator.
System Operators	System Operators has no access to ClientPoint or ShelterPoint. They have not access to reporting functions but do have access to administrative functions. The System Operator can setup new agencies, add new users, reset passwords and access other system-level options. The system operator helps to maintain the system, but does not have access to any Client or Service records. The System Operator can order additional user licenses and modify the allocation of licenses. This role does not perform entry of data for multiple Providers.
System Administrator I	System Administrator I has the same access rights to Client information (full access) as the Agency Administrator. In addition, this user also has full access to administrative functions.
System Administrator II	System Administrator II has full and complete access to the system with the exception of the option of choosing a Provider other than the default Provider assigned to their ID. This role is not meant to perform entry of data for multiple Providers.

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APPENDIX B - USER ROLES MAP

Access Description	Volunteer	Resource Spec.I	Resource Spec.II	Resource Spec. III	Agency Staff	Case Mgr. I	Case Mgr. II	Agency Admin.*	Exec.Director*	Sys. Op.	Sys. Admin. I	Sys. Admin. II
ClientPoint Module	Yes	No			Yes		Yes	Yes	Yes	Yes	Yes	Yes
ResourcePoint Module	No	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes
ShelterPoint Module	No				Yes		Yes	Yes	Yes	Yes	Yes	Yes
SkanPoint Module	No				Yes		Yes	Yes	Yes	Yes	Yes	Yes
Report Module	No				Yes		Yes	Yes	Yes	Yes	Yes	Yes
Admin Module	No	No	No	No	No	No	No	Yes	Yes	Yes	Yes	Yes
Access Multiple Providers	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
System-Wide Access	No	No	No	Yes	No	No	No	No	No	No	No	Yes
Agency Administration	No	No	No	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes
Use Shadow Mode	No	No	No	No	No	No	No	Yes	Yes	Yes	Yes	Yes
Agencies and Program Data	V	V U	V U	V U C	V		V C U D	V C U D	V C U D	V C U D	V C U D	V C U D
Client Profile Demographics	V C				V U		V C U D	V C U D	V C U D			V
Client Profile Detail Entries					V U		V C U D	V C U D	V C U D			V
Client Service Records					V U		V C U D	V C U D	V C U D			V
Client Assessments					V U		V C U D	V C U D	V C U D			V
Client Case Plans					V U		V C U D	V C U D	V C U D			V
Client Service Transactions					V U		V C U D	V C U D	V C U D			V
Client Referrals	C				V C U	V C U	V C U D	V C U D	V C U D			V
Client Check-In/Check-Out					V C U	V C U	V C U D	V C U D	V C U D			V
System NewsFlash	V	V	V	V	V	V	V	V	V	V C U D	V C U D	V C U D
Agency NewsFlash	V	V	V U	V	V	V	V	V C U D	V C U D	V C U D	V C U D	V C U D
Audit Reports						V C	V C	V C	V C	V C	V C U D	V C U D
Provider Reports					C	C	C	V C	V C	V C	V C U D	V C U D
Custom Reports					C	C	C	V C	V C	V C	V C U D	V C U D
User Accounts								V C U D	V C U D	V C U D	V C U D	V C U D
Licenses Allocation								V C U D	V C U D	V C U D	V C U D	V C U D
PickList Data								V C U D	V C U D	V C U D	V C U D	V C U D
System Preferences								V C U D	V C U D	V C U D	V C U D	V C U D
Reset Passwords								U	U	U	U	U
User Accounts Activation								U	U	U	U	U
User Accounts De-Activate								U	U	U	U	U

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APPENDIX C – PROVIDER FIELD DEFINITIONS

FIELD NAME	DESCRIPTION
Official Update	Date of formal update of the Provider information updated on a scheduled basis
Name	Name of the Provider being created
Parent Provider	If not creating Level 1 Provider, the parent Provider name displays as a hyperlink for access to the parent Provider page
Status	A non-editable field that displays whether Provider is active or inactive within the community
Contact Person	Name of contact related to this Provider
Contact Title	Tile of contact related to this Provider
Street Address	Physical street location of this Provider
(more) Street Address	Additional location information such as floor or suite number
City	Physical city location of this Provider
State	Physical state location of this Provider
Zip	Zip code of this Provider
County	County of this Provider
Area	Geographical Area used as a search criteria in ResourcePoint
Mailing Address	Mailing address of this Provider
(more) Mailing Address	Additional mailing address information such as mail stop
Mailing City	Mailing address city
Mailing State	Mailing address state
Mailing Zip	Mailing address zip
Telephone 1-4 (Description)	List descriptions for up to four telephone numbers for this Provider
Telephone 1-4 (Number)	List up to four telephone numbers Provider
Fax	Fax number of this Provider
Email Address	Email address to use to contact this Provider
Website Address	Website address for this Provider
Provider Type ID	Designation for type of Service Provider i.e. non-profit, government agency, etc.
Show On Public Site	For use in CommunityPoint
Printed Directory	For use in CommunityPoint
Description	Description of Services provided by this Provider
Landmarks	Description of landmarks to help locate this Provider such as cross street
Handicap Access	Select Yes or No as to whether this Provider has handicap access to their location.
Brochure	Select Yes or No as to whether the Provider has a brochure available for viewing.
Hours	Hours of operation for this Provider
Zips Serviced	Zip codes Serviced by this Provider
ServicePoint Interface	Always choose ServicePoint: standard
Default City	Used to provide pre-selected city when entering data for this Provider and its Clients
Default State	Used to provide pre-selected state when entering data for this Provider and its Clients
Default County	Used to provide pre-selected county when entering data for this Provider and its Clients
Program Fees	List fees associated with this Provider's Services

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FIELD NAME	DESCRIPTION
Intake Procedure	Describe requirements
Eligibility	General eligibility requirements to be displayed on the Provider Profile Screen
Languages	List languages that are spoken by personnel at this Provider
Is this Provider a shelter	Select Yes or No as to whether this Provider is a shelter
Shelter Requirements	If Yes selected above, list requirements of this shelter Provider
Shelter Service Code	The Service code selected here will be recorded for each Shelter check-in. If left blank, it will default to Emergency Shelter.
Master Flag	A legacy from earlier versions of ServicePoint. Leave selection to No
Uses ServicePoint	Select Yes or No as to whether this Provider is using a ServicePoint system.

Fields that display after a Provider is created:

FIELD NAME	DESCRIPTION
Last Updated	Date of last update and user who performed update
Created	Date this Provider was created
Provider Specific Services	List specific Services offered by the Provider
Areas Served	No function
Bedlists	Used in ShelterPoint to manage shelter beds
Cities Served	List cities Serviced by the Provider
Services Provided	Uses Service codes to describe the Services offered by this Provider
Service Quicklist	Used to provide pre-selected Service codes for use when entering Client data
Referral Quicklist	Used to provide pre-selected Providers for Referral purposes
Provider Groups	Used by System Administrators to run reports on multiple Providers across Provider trees.
Child Providers	Used to create and access Child Providers of the current Provider being viewed
Potential Exceptions	Defines Provider exceptions to default access settings
Default Restrictions and Exceptions	Defines default settings in access and viewing Client data stored by this Provider
Assessment Administration	Defines assessment to be used by this Provider

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APPENDIX D - PROVIDER CONFIGURATION WORKSHEET

Provider Name:		**Parent:**	
ServicePoint User?:	☐ Yes ☐ No	Shelter?:	☐ Yes ☐ No

Provider Specific Services

Name

1.	2.
3.	4.
5.	6.

Areas Served

1.	2.
3.	4.
5.	6.

Bedlists

Name	Section	Name	Section
1.		2.	
3.		4.	
5.		6.	

Cities Served

Counties Served

Services Provided

Service Description

1.	2.
3.	4.
5.	6.

Services Quicklist

Name

1.	2.
3.	4.

Referral Quicklist

Name

1.	2.
3.	4.

Child Providers

Name

1.	2.
3.	4.
5.	6.

Potential Exceptions

Provider Name

1.	Add to All : ☐ Open ☐ Closed
2.	Add to All : ☐ Open ☐ Closed
3.	Add to All : ☐ Open ☐ Closed
4.	Add to All : ☐ Open ☐ Closed

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APPENDIX E - PROVIDER RESTRICTIONS AND EXCEPTIONS WORKSHEET

PROVIDER NAME:		PARENT:	

Restrictions and Exceptions Category	Default Exceptions (Open or Closed)	Open with Exception Provider Name	Closed with Exception Provider Name
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
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	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		
	☐ Open / ☐ Closed		

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APPENDIX F - USER CONFIGURATION WORKSHEET

User Name:				
Provider Name:				
Login Name:				
Assigned Password:				
Access Level:	☐	Volunteer	☐	Case Manager II
	☐	Resource Specialist I	☐	Agency Administrator
	☐	Resource Specialist II	☐	Executive Director
	☐	Resource Specialist III	☐	System Operator
	☐	Agency Staff	☐	System Administrator I
	☐	Case Manager I	☐	System Administration II
User Expiration:				
Status:	☐	Active	☐	Inactive
Code Sets:	☐	AIRS Taxonomy	☐	CPT
	☐	ICD-9	☐	DSM-IV-TR
Special Permissions:	☐	None		
	☐	Allow User to Back-Date Releases of Information		
	☐	Allow User to Change the Security of their Client's Assessments		
	☐	Allow User to Use the SkanPoint Module		

Providers this user may enter date as: *(visible after user is created)*	
1.	9.
2.	10.
3.	11.
4.	12.
5.	13.
6.	14.
7.	15.
8.	16.

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APPENDIX G - PROVIDER BEDLIST WORKSHEET

Provider Name:		**Parent:**	
Shelter Name:		**Shelter Type:**	
Floor Name:		**Room Name:**	
Beds			
8)	9)	10)	11)
12)	13)	14)	15)
16)	17)	18)	19)
20)	21)	22)	23)
24)	25)	26)	27)
28)	29)	30)	31)
32)	33)	34)	35)
36)	37)	38)	39)
Floor Name:		**Room Name:**	
Beds			
1.	2.	3.	4.
5.	6.	7.	8.
9.	10.	11.	12.
13.	14.	15.	16.
17.	18.	19.	20.
21.	22.	23.	24.
25.	26.	27.	28.
29.	30.	31.	32.
Floor Name:		**Room Name:**	
Beds			
1.	2.	3.	4.
5.	6.	7.	8.
9.	10.	11.	12.
13.	14.	15.	16.
17.	18.	19.	20.
21.	22.	23.	24.
25.	26.	27.	28.
29.	30.	31.	32.

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